User Manual & Documentation

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Broadcast Mail

Help Page Title	Synopsis
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Build List From Customers Database	Use this page to build a mail list from the Customer database.
Build List From Mail List Database	Use this page to build a mail list from the Mail List database.
Build List From Referral Contacts	Use this page to build a mail list from the Referrals database.
Build List From System Users	Use this page to build a mail list from the System Users database.
Build List From Tickets Database	Use this page to build a mail list from the request tickets database.
Review Mailing List And Send Message	Use this page to refine your mailing list, send a test message, and send your broadcast mail.

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Customer Database

Help Page Title	Synopsis
Customer Database Add Page	Use this page to add a new entry into the Customer database.
Customer Database Detail Page	Shows the detail for a record in the Customer database.
Customer Database Edit Page	Use this page to edit the Customer database.
Customer Database List Page	Lists contacts from the Customer Database.
Customer Database Search Page	Use this page to search the Customer database.

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FAQ Database

Help Page Title	Synopsis
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top Knowledge Base

top Mail List

top Manage Accounts

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Help Page Title	Synopsis
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Notes Detail Page	Use this page to view a note that is attached to a request ticket.
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Help Page Title	Synopsis
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My Response Detail Listing	Shows the detail for a record in the response database.
My Response Edit Page	Use this page to edit a quick response listing.
My Response List Page	This page lists available quick responses.
My Response Search Page	Use this page to search the Quick Response database.

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Referral Lists

Help Page Title	Synopsis
Referral Lists Add Page	Use this page to add a Referral Lists listing.
Referral Lists Detail Page	Shows the detail for a record in the Referral Lists database.
Referral Lists Edit Page	Use this page to edit a Referral List.
Referral Lists List Page	Lists items from the Referral Lists database.

top
Referral Messages

Help Page Title	Synopsis
Referral Messages Add Page	Use this page to add a Referral Message listing.
Referral Messages Detail Page	Shows the detail for a record in the Referral Message database.
Referral Messages Edit Page	Use this page to edit a Referral Message.
Referral Messages List Page	Lists items from the Referral Messages database.

top
Referrals Database

Help Page Title	Synopsis
Referral Contacts Add Page	Add a referral contact.
Referral Contacts Detail Page	Detailed information regarding a referral contact.
Referral Contacts Edit Page	Used to modify referral contact information.
Referral Contacts List Page	List of referral contacts that match a search or browse.
Referral Contacts Search Page	Used to search the referral contacts database.

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Reports

top
Request Database

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Setup Categories

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User Feedback

User Manual & Documentation

PAGE TITLE

Broadcast Email List Options

SYNOPSIS

This page is used by the department Supervisor to generate mailing lists for sending broadcast mail.

HELP TOPIC

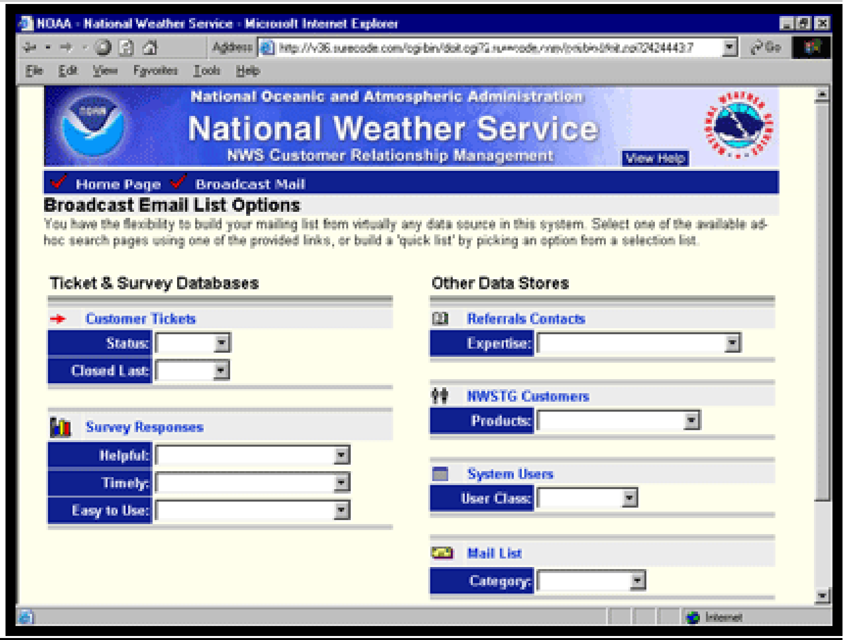
Broadcast Mail

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Broadcast Mail:	Reopens the current page. This link is provided for menu consistency between the various pages in this module.



DETAILED DESCRIPTION

This page provides a wide variety of different ways to build a broadcast mailing list. As a Supervisor, you can build the list from virtually any data available within the system.

You have two basic options for building your list.

(1) You can select a value from one of the available selection lists. This will immediately build your list based on the value you choose and open a broadcast mail page where you can make further refinements to the list if necessary.

(2) You can click on one of the provided page links to open a selection page that provides many additional options. This method includes an additional step, but it provides much more flexibility.

PAGE LINKS

Each of the page links described below opens a selection page that provides various additional choices for building your mailing list.

Customer Tickets:	Click on this link to build a mailing list using data from the service request database.
Survey Responses:	Click on this link to build a mailing list from customer feedback provided in the survey.
Referral Contacts:	Click on this link to build a mailing list from data provided in the Referral Contacts database.
Customers:	Click on this link to build a mailing list from data in the Customers database.

USER INPUTS

Each of the selection lists described below will build a *"quick list"* based on the value you select.

Status:	Build a list of customers that have a ticket status with the selected value.
Closed Last:	Build a list of customers based on tickets being closed within the last 1 - 90 days.
Helpful:	Build a list of customers based on how they feel about the helpfulness of the service they received.
Timely:	Build a list of customers based on how they feel about the time frame of the service they received.
Easy to Use:	Build a list of customers based on how they feel regarding the ease-of-use of this system.
Expertise:	Build a list of referral contacts based on the selected area of expertise.

System Users:	Click on this link to build a mailing list from the NWS CRM system users database.
Mail List:	Click on this link to build a mailing list from the Mail List database.

Products:	Build a list of customers based on their subscription the selected product.
User Class:	Build a list of system users based on the selected user class.
Category:	Build a list of mail recipients based on the selected mail list category.

OTHER HELP PAGES RELATING TO THIS TOPIC

Build List From Customer Feedback
Build List From Customers Database
Build List From Mail List Database
Build List From Referral Contacts
Build List From System Users
Build List From Tickets Database
Review Mailing List And Send Message

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User Manual & Documentation

PAGE TITLE

Build List From Customer Feedback

SYNOPSIS

Use this page to build a mail list based on customer feedback provided in the customer satisfaction survey.

HELP TOPIC

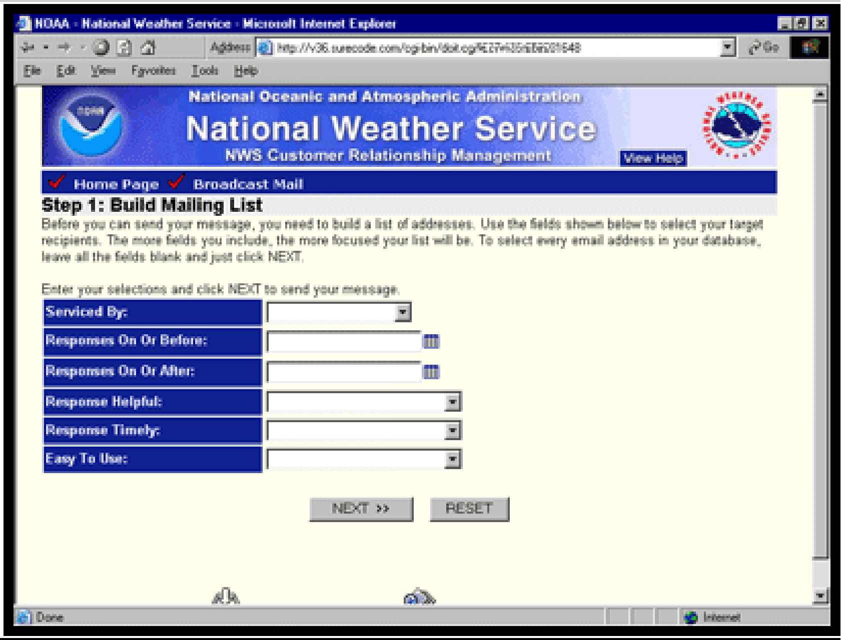
Broadcast Mail

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Broadcast Mail:	Links to the Broadcast Email page.



DETAILED DESCRIPTION

This page gives great flexibility in building a highly targeted mailing list. You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your list will be.

To build a list of *every* person that ever responded to the customer satisfaction survey, just leave all the input fields blank and click the **NEXT** button.

PAGE LINKS

None

USER INPUTS

After selecting one or more criteria from the options shown below, click the **NEXT** button to build your list.

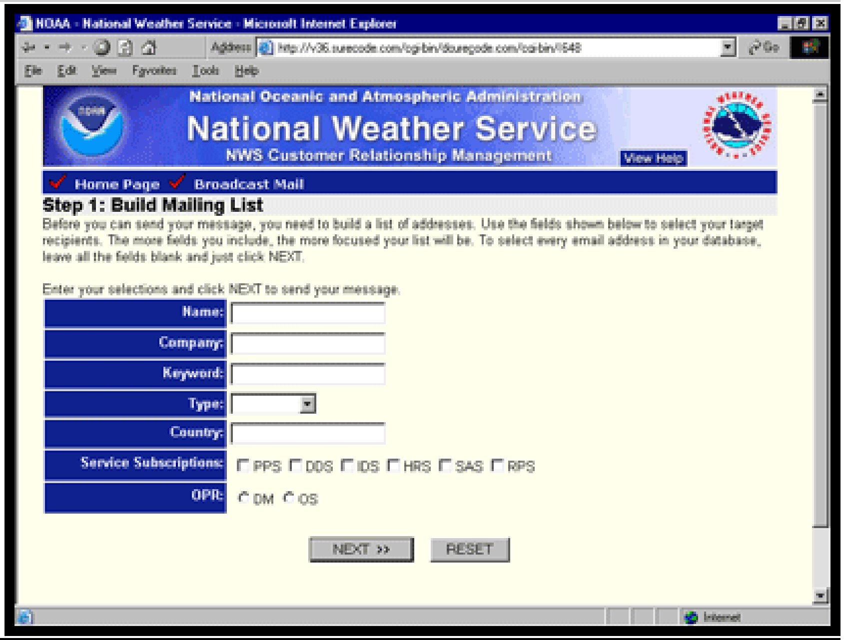
Serviced By:	Build from surveys provided from customers who were serviced by the selected Service Representative.
Responses On Or Before:	Build from survey responses provided on or before the indicated date.
Responses On Or After:	Build from surveys received on or after the indicated date.
Response Helpful:	Build from surveys that indicated the selected answer on the *"Response Helpful"* question.
Response Timely:	Build from surveys that indicated the selected answer on the *"Response Timely"* question.
Easy To Use:	Build from surveys that indicated the selected answer on the *"Site Easy"* question.

OTHER HELP PAGES RELATING TO THIS TOPIC
Broadcast Email List Options
Build List From Customers Database
Build List From Mail List Database
Build List From Referral Contacts
Build List From System Users
Build List From Tickets Database
Review Mailing List And Send Message

User Manual & Documentation

PAGE TITLE

Build List From Customers Database



SYNOPSIS

Use this page to build a mail list from the Customer database.

HELP TOPIC

Broadcast Mail

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Broadcast Mail:	Links to the Broadcast Email page.

DETAILED DESCRIPTION

This page gives you great flexibility in building a highly targeted mailing list. You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your list will be.

To build a list of *every* person in the Customer database, just leave all the input fields blank and click the **NEXT** button.

PAGE LINKS

None

USER INPUTS

After selecting one or more criteria from the options shown below, click the **NEXT** button to build your list.

Name:	Build the list based on customers with the entered name or name fragment.
Company:	Build the list based on customers with the indicated company name or fragment.
Keyword:	Build the list based on customers with the following keywords. Multiple words are combined using a logical *AND*. Keywords are matched against all available information fields.
Type:	Build the list based on customers with the selected Customer type.
Country:	Build the list based on customers from the indicated country.

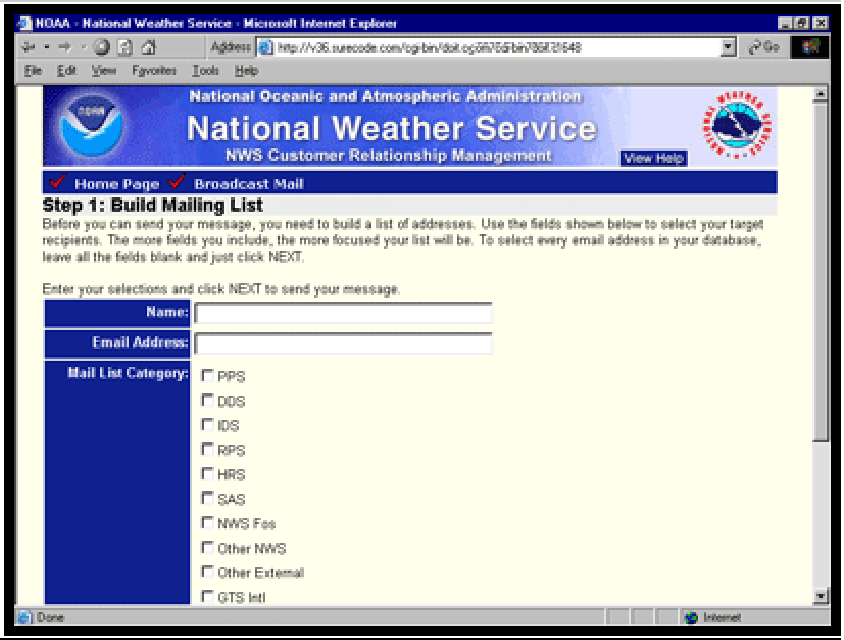
Service Subscriptions:	Build the list based on customers that subscribe to the following services.
OPR:	Build the list based on customers with the selected Office of Primary Responsibility.

OTHER HELP PAGES RELATING TO THIS TOPIC
Broadcast Email List Options
Build List From Customer Feedback
Build List From Mail List Database
Build List From Referral Contacts
Build List From System Users
Build List From Tickets Database
Review Mailing List And Send Message

User Manual & Documentation

PAGE TITLE

Build List From Mail List Database



SYNOPSIS

Use this page to build a mail list from the Mail List database.

HELP TOPIC

Broadcast Mail

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Broadcast Mail:	Links to the Broadcast Email page.

DETAILED DESCRIPTION

You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your list will be.

To build a list of *every* person in the Mail List database, just leave all the input fields blank and click the **NEXT** button.

PAGE LINKS

None.

USER INPUTS

After selecting one or more criteria from the options shown below, click the **NEXT** button to build your list.

Name:	Build the list based on the indicated name or fragment.
Email Address:	Build the list based on individuals with the following email address fragment.
Mail List Category:	Build the list based on individuals with the selected categories.

OTHER HELP PAGES RELATING TO THIS TOPIC

Broadcast Email List Options

Build List From Customer Feedback

Build List From Customers Database

Build List From Referral Contacts

Build List From System Users

Build List From Tickets Database

Review Mailing List And Send Message

User Manual & Documentation

PAGE TITLE

Build List From Referral Contacts

SYNOPSIS

Use this page to build a mail list from the Referrals database.

HELP TOPIC

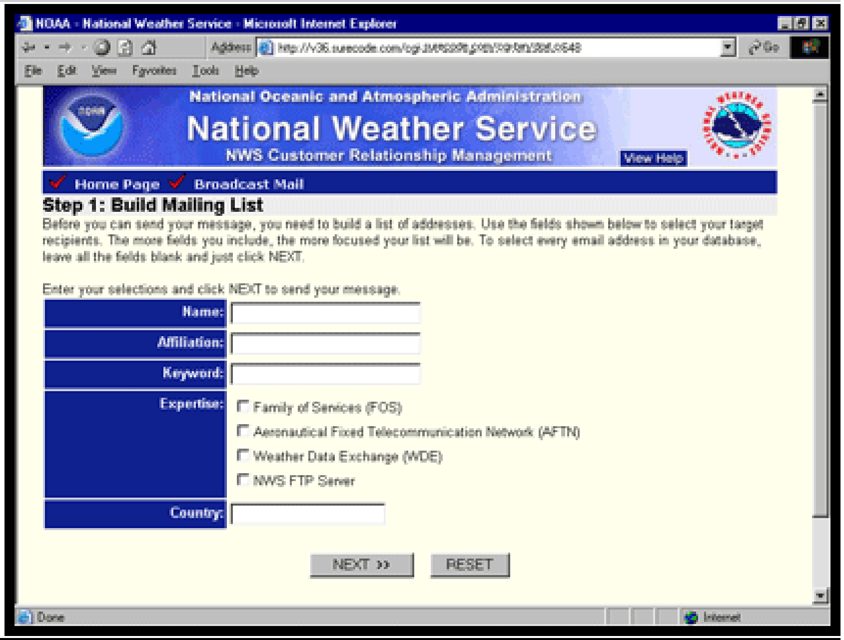
Broadcast Mail

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Broadcast Mail:	Links to the Broadcast Email page.



DETAILED DESCRIPTION

This page gives you great flexibility in building a highly targeted mailing list. You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your list will be.

To build a list of *every* person in the Referrals database, just leave all the input fields blank and click the **NEXT** button.

PAGE LINKS

None.

USER INPUTS

After selecting one or more criteria from the options shown below, click the **NEXT** button to build your list.

Name:	Build the list based on referral contacts with the provided name or name fragment.
Affiliation:	Build the list based on referral contacts with the provided affiliations.
Keyword:	Build the list based on referral contacts with the following keywords. Multiple words are combined using a logical *AND*. Keywords are matched against all available information fields.
Expertise:	Build the list based on referral contacts with one or more of the listed areas of expertise.
Country:	Build the list based on referral contacts with the indicated country.

OTHER HELP PAGES RELATING TO THIS TOPIC
Broadcast Email List Options
Build List From Customer Feedback
Build List From Customers Database
Build List From Mail List Database
Build List From System Users
Build List From Tickets Database
Review Mailing List And Send Message

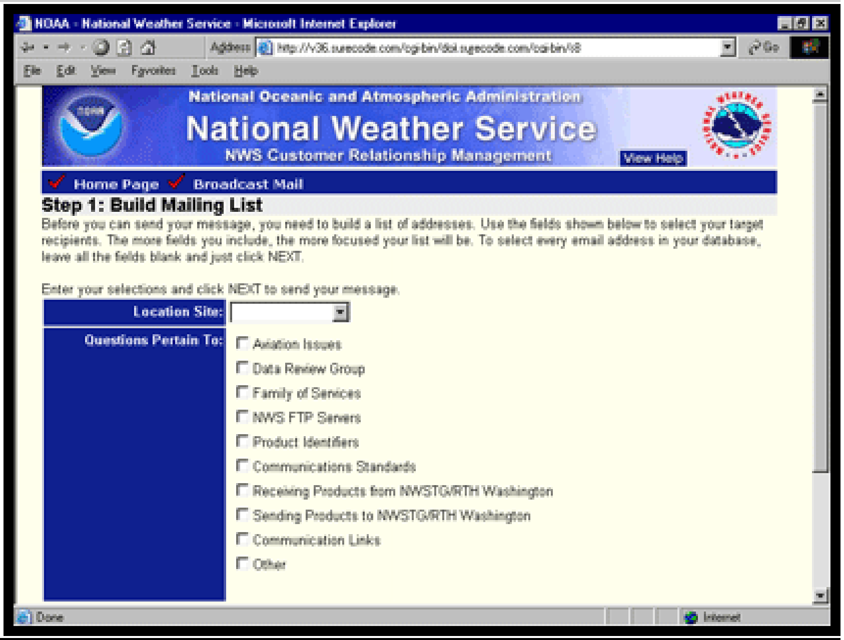
User Manual & Documentation

PAGE TITLE

Build List From System Users

SYNOPSIS

Use this page to build a mail list from the System Users database.



HELP TOPIC

Broadcast Mail

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Broadcast Mail:	Links to the Broadcast Email page.

DETAILED DESCRIPTION

You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your list will be.

To build a list of *every* person in the System Users database, just leave all the input fields blank and click the **NEXT** button.

PAGE LINKS

None.

USER INPUTS

After selecting one or more criteria from the options shown below, click the **NEXT** button to build your list.

Location Site:	Build the list based on system users from the indicated site location.
Questions Pertain To:	Build the list based on system users that have the following areas of expertise selected in their profiles.

OTHER HELP PAGES RELATING TO THIS TOPIC

Broadcast Email List Options

Build List From Customer Feedback

Build List From Customers Database

Build List From Mail List Database

Build List From Referral Contacts

Build List From Tickets Database

Review Mailing List And Send Message

User Manual & Documentation

PAGE TITLE

Build List From Tickets Database

SYNOPSIS

Use this page to build a mail list from the request tickets database.

HELP TOPIC

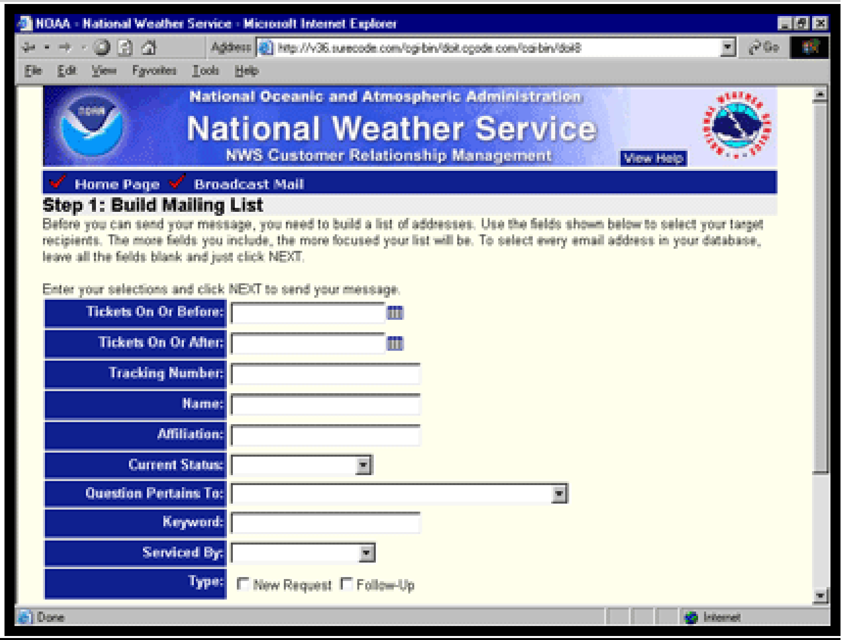
Broadcast Mail

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Broadcast Mail:	Links to the Broadcast Email page.



DETAILED DESCRIPTION

This page gives you great flexibility in building a highly targeted mailing list. You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your list will be.

To build a list of *every* person that ever requested service, just leave all the input fields blank and click the **NEXT** button.

PAGE LINKS

None

USER INPUTS

After selecting one or more criteria from the options shown below, click the **NEXT** button to build your list.

Tickets On Or Before:	Build the list based on customer tickets created on or before the indicated date.
Tickets On Or After:	Build the list based on customer tickets created on or after the indicated date.
Tracking Number:	Build the list based on customer tickets with the provided tracking number or fragment.
Name:	Build the list based on customer tickets with the provided name or name fragment.
Affiliation:	Build the list based on customer tickets with the indicated affiliation.
Current Status:	Build the list based on customer tickets with the selected status.
Question Pertains To:	Build the list based on customer tickets with the indicated request category.

Keyword:	Build the list based on customer tickets with the following keywords. Multiple words are combined using a logical *AND*. Keywords are matched against all available information fields.
Serviced By:	Build the list based on customer tickets serviced by the selected Service Representative.
Type:	Build the list based on customer ticket type: New or Follow-Up.

OTHER HELP PAGES RELATING TO THIS TOPIC

Broadcast Email List Options
Build List From Customer Feedback
Build List From Customers Database
Build List From Mail List Database
Build List From Referral Contacts
Build List From System Users
Review Mailing List And Send Message

User Manual & Documentation

PAGE TITLE

Review Mailing List And Send Message

SYNOPSIS

Use this page to refine your mailing list, send a test message, and send your broadcast mail.

HELP TOPIC

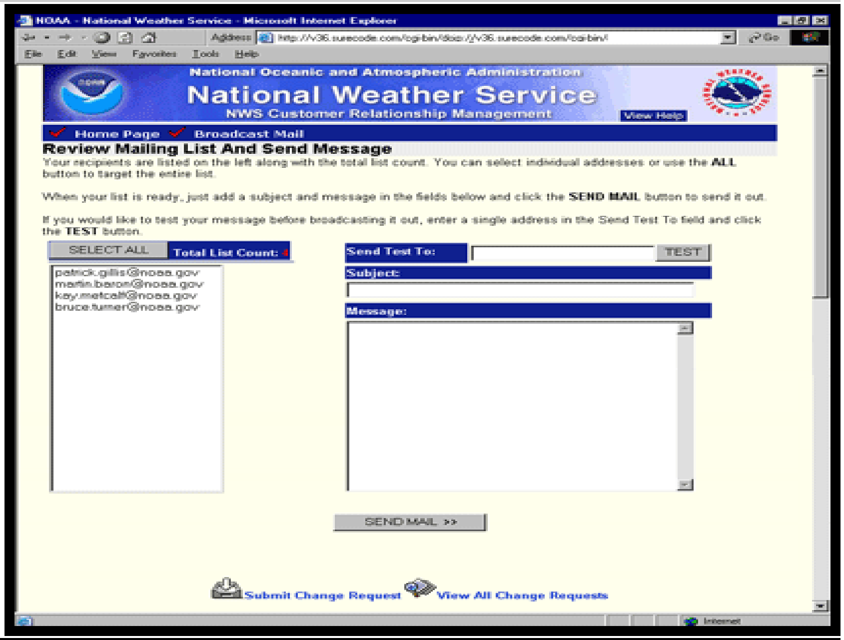
Broadcast Mail

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Broadcast Mail:	Links to the Broadcast Mail page.



DETAILED DESCRIPTION

Based on your selections on the previous page, the list of potential recipients is shown on the left. If your selections were such that no matching email addresses could be found, the list is hidden and a status message is shown instead. In this case, click the Back button on your Browser and try to select a less restrictive set of filter options.

You have the flexibility to send your message to everyone on the broadcast list, or only to selected addresses. To send to everyone, click the **SELECT ALL** button at the top of the list. This will cause all of the names on the list to become highlighted.

To target individual addresses, use your mouse and the **Ctrl** key on your keyboard. Press and hold the **Ctrl** key and use your mouse to highlight just those addresses you want to include. If you accidentally select an incorrect address, clicking on it again with the **Ctrl** key pressed will de-select it.

If you have a long list and want to send to everyone *except* a few individuals, click the **SELECT ALL** button and - again - de-select those one or two addresses by clicking with the mouse while holding the **Ctrl** key depressed.

Note: *the instructions outlined above assume you are using Windows. Other systems usually provide equivalent capabilities, but some of the keystrokes may be different. Please consult your OS manual to get more information on your particular system*

After you refine your broadcast list, enter the subject line and message in the provided input boxes. Whatever you type will be passed along. Do not use HTML tags in your message - these may interfere with the HTML tags necessary to make the broadcast mail page work properly.

Once you think you have your message ready to go, the system lets you test it by providing the ability to send a test email to a single address. To use this feature, simply enter the email address of the test recipient into the **Send Test To** input box and click the **TEST** button. You can apply edits to the message and send tests as many times as necessary to get your message and presentation just right.

Finally, after you refine your list and test your message, click the **SEND MAIL** button located at the bottom of the page to send your message to all of the addresses that you selected.

PAGE LINKS

Select All:	Highlights all of the addresses on the selection list.
Test:	Sends a test email message to the indicated address.
Send Mail:	Sends the mail message to all of the highlighted addresses on the list.

USER INPUTS

The following provides details regarding the available input fields. After you make any necessary edits, click the SEND MAIL button to send your broadcast mail.

Send Test To:	The email address where the test message should be sent.
Subject:	Subject for broadcast mail message.
Message:	Message body for broadcast mail message.

OTHER HELP PAGES RELATING TO THIS TOPIC

Broadcast Email List Options
Build List From Customer Feedback
Build List From Customers Database
Build List From Mail List Database
Build List From Referral Contacts
Build List From System Users
Build List From Tickets Database

User Manual & Documentation

PAGE TITLE

Customer Database Add Page

SYNOPSIS

Use this page to add a new entry into the Customer database.

HELP TOPIC

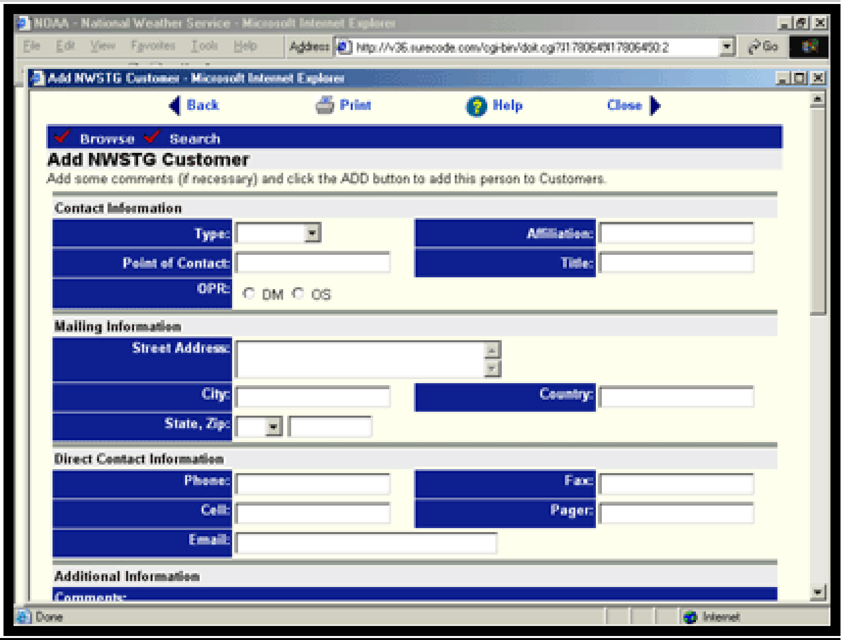
Customer Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list all the data available in the database.
Search:	Click here to go to the Search page.



DETAILED DESCRIPTION

This page is used to add a new data record to the Customer database. This is available to both Service Representatives and Supervisors.

Although either type of user can create a new entry, the system will prevent Service Representatives from making any changes or deleting an entry after it has been in the system for one hour. This feature gives Service Representatives the ability to make edits and corrections while adding something new, but prevents them from making any changes thereafter. Only a Supervisor can edit or delete an entry after the initial grace period expires.

PAGE LINKS

None.

USER INPUTS

Use the following fields to store customer information. Note that all of the fields shown below are optional except for Affiliation, Point of Contact, and OPR.

Contact Information

Type:	Enter the type of customer.
Point of Contact:	The point-of-contact for this customer.
Title:	The point-of-contact's title with the organization.
Affiliation:	The name of the organization, company, or office.
OPR:	The office of primary responsibility for working with this customer.

Mailing Information

Street Address:	The street or mailing address.
City:	The city of the customer organization.

Country:	The country of the customer organization.
State:	The state of the customer organization.
Zip:	The zip code of the customer organization.

Direct Contact Information

Phone:	Area code and phone number for the point-of-contact.
Fax:	Area code and fax number for the point-of-contact.
Cell:	Area code and cell phone number for the point-of-contact.
Pager:	Area code and pager phone number for the point-of-contact.
Email:	Email address for the point-of-contact.

Additional Information

Comments:	Enter any comments here.
Emergency Contact Info	Emergency contact information if different from above.
Subscriptions:	Enter any subscription services for this customer in the provided fields.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Database Detail Page
Customer Database Edit Page
Customer Database List Page
Customer Database Search Page

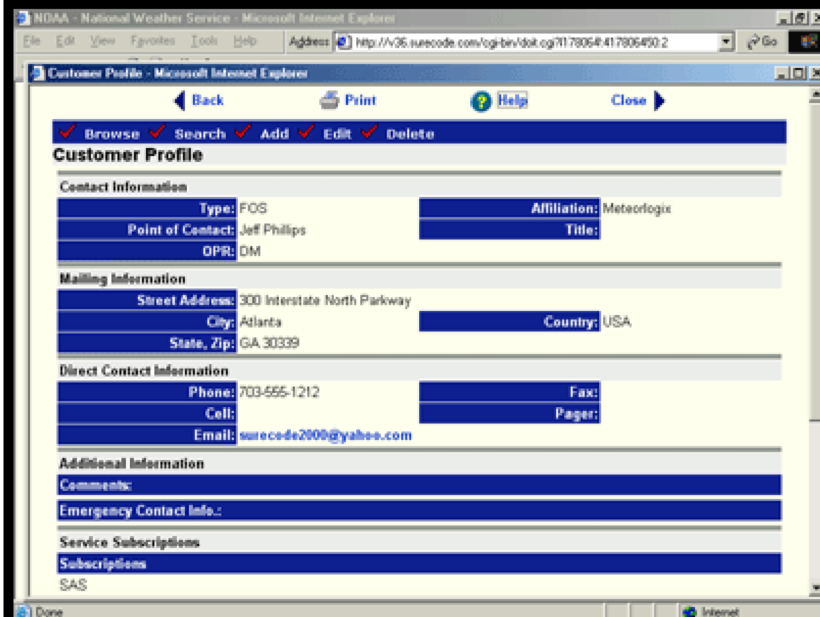
User Manual & Documentation

PAGE TITLE

Customer Database Detail Page

SYNOPSIS

Shows the detail for a record in the Customer database.



HELP TOPIC

Customer Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list the entire contents of the database.
Search:	Click here to open the Search page.
Add:	Click here to add a new data record into the database.
Edit:	Click here to edit the current page.
Delete:	Click here to delete the current listing from the database.

DETAILED DESCRIPTION

None.

PAGE LINKS

None.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Database Add Page

Customer Database Edit Page

Customer Database List Page

Customer Database Search Page

User Manual & Documentation

PAGE TITLE

Customer Database Edit Page

SYNOPSIS

Use this page to edit the Customer database.

HELP TOPIC

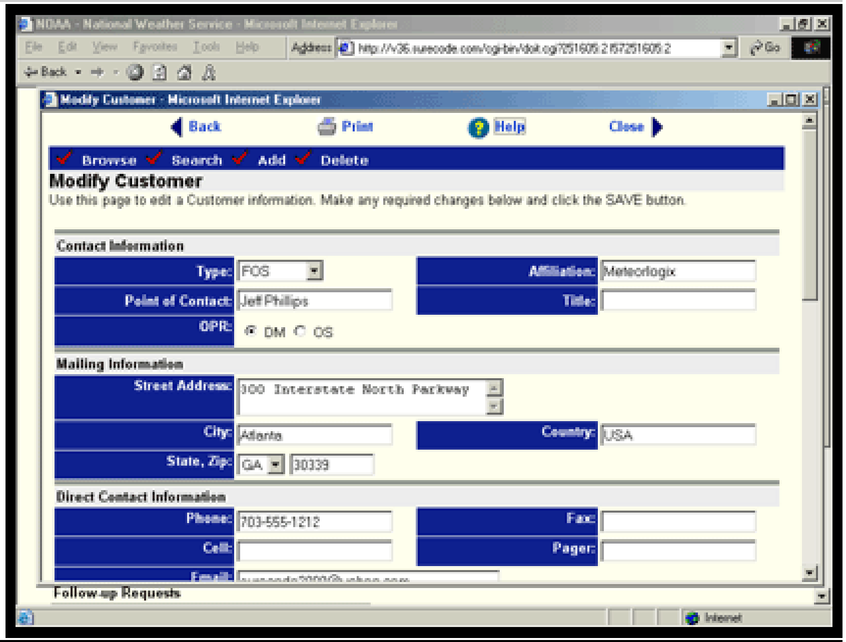
Customer Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list all the data available in the database.
Search:	Click here to go to the Search page.
Add:	Click here to add a new record to the database.
Delete:	Click here to delete the current record.



DETAILED DESCRIPTION

Service Representatives can edit within the first hour after creating a new entry. Once this grace period expires, this feature is only available to Supervisors.

PAGE LINKS

None.

USER INPUTS

Use the following fields to store customer information. Note that all of the fields shown below are optional except for Affiliation, Point of Contact, and OPR.

Contact Information

Type:	Enter the type of customer.
Point of Contact:	The point-of-contact for this customer.
Title:	The point-of-contacts title with the organization.
Affiliation:	The name of the organization, company, or office.
OPR:	The office of primary responsibility for working with this customer.

Mailing Information

Street Address:	The street or mailing address.
City:	The city of the customer organization.
Country:	The country of the customer organization.
State:	The state of the customer organization.

Zip:	The zip code of the customer organization.

Direct Contact Information

Phone:	The area code and phone number for point-of-contact.
Fax:	The area code and fax number for point-of-contact.
Cell:	The area code and cell phone number for the point-of-contact.
Pager:	The area code and pager phone number for the point-of-contact.
Email:	The email address for the point-of-contact.

Additional Information

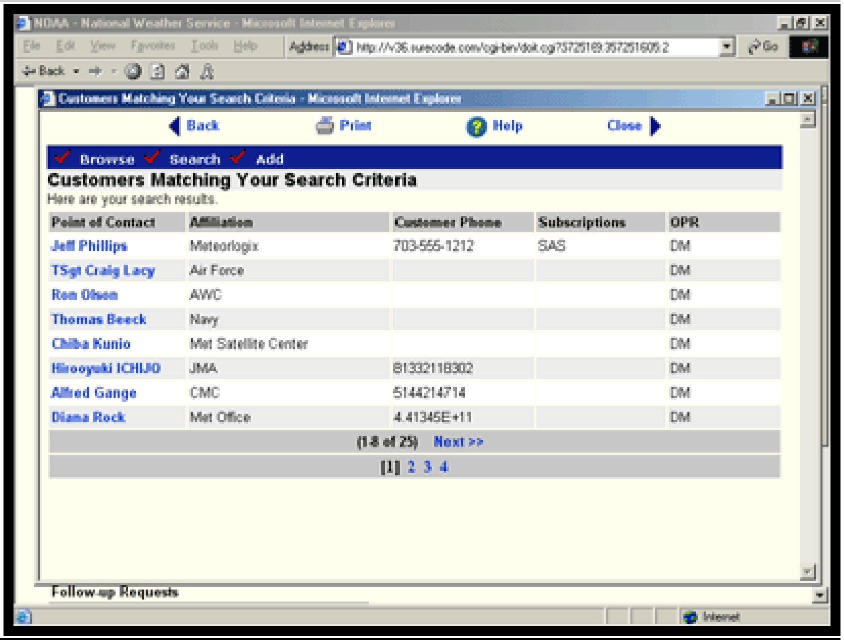
Comments:	Enter any comments here.
Emergency Contact Info	Emergency contact information if different from above.
Subscriptions:	Enter any subscription services for this customer in the provided fields.

OTHER HELP PAGES RELATING TO THIS TOPIC
Customer Database Add Page
Customer Database Detail Page
Customer Database List Page
Customer Database Search Page

User Manual & Documentation

PAGE TITLE

Customer Database List Page



SYNOPSIS

Lists contacts from the Customer Database.

HELP TOPIC

Customer Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list the entire contents of the database.
Search:	Click here to open the Search page for this database.
Add:	Click here to add a new record to the database.

DETAILED DESCRIPTION

The Customer Database List Page is displayed after a search or when the Browse menu item is selected. When used with a search page, it displays the customers that match the user provided selection criteria. When used with the browse option, it lists the entire contents of the Customer Database.

PAGE LINKS

Point of Contact:	Click here to open the Detail page for the listed customer.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Database Add Page

Customer Database Detail Page

Customer Database Edit Page

Customer Database Search Page

User Manual & Documentation

PAGE TITLE

Customer Database Search Page

SYNOPSIS

Use this page to search the Customer database.

HELP TOPIC

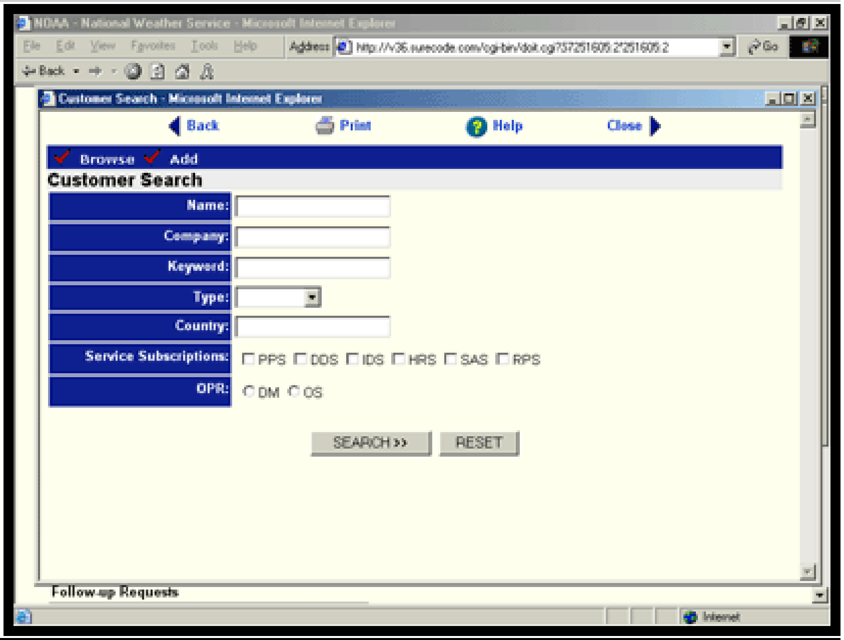
Customer Database

USER CLASS

Supervisor

MENU SELECTIONS

Browse:	Click here to list all contacts.
Add:	Click here to add a new customer to the database.



DETAILED DESCRIPTION

This page gives you great flexibility in searching the Customer database. You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your results will be.

To list *every* contact in the Customers database, just leave all the input fields blank and click the **SEARCH** button.

PAGE LINKS

None.

USER INPUTS

After selecting one or more criteria from the options shown below, click the **SEARCH** button to see those matching customers.

Name:	Search using the entered name or name fragment.
Company:	Search using the entered company name or fragment.
Keyword:	Search using the following keywords. Multiple words are combined using a logical *AND*. Keywords are matched against all available information fields.
Type:	Search using the selected Customer type.
Country:	Search using the indicated country.
Service Subscriptions:	Search based on customers that subscribe to the following services.
OPR:	Search based on customers with the selected Office of Primary Responsibility.

OTHER HELP PAGES RELATING TO THIS TOPIC
Customer Database Add Page
Customer Database Detail Page
Customer Database Edit Page
Customer Database List Page

User Manual & Documentation

PAGE TITLE

FAQ Database Add Page

SYNOPSIS

Use this page to add a new entry into the FAQ Database.

HELP TOPIC

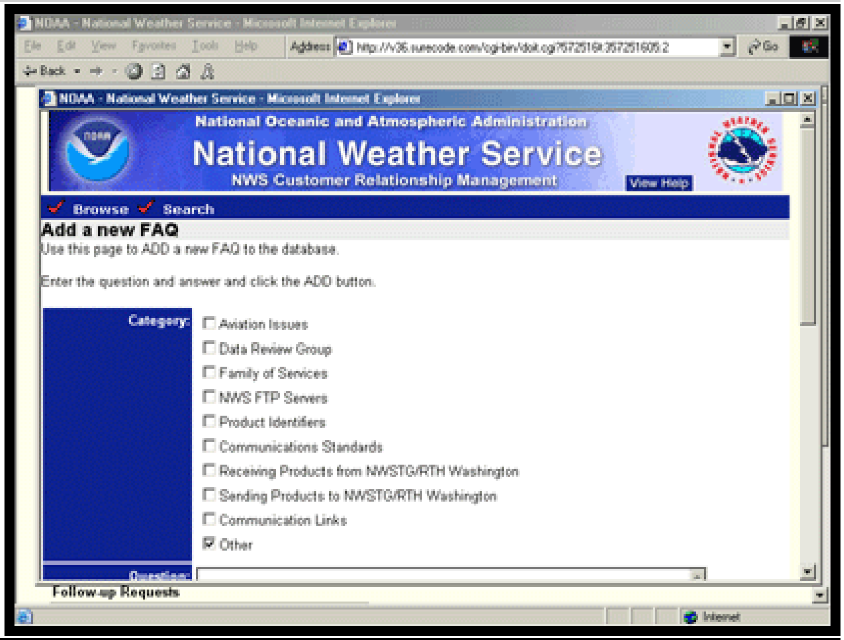
FAQ Database

USER CLASS

Supervisor

MENU SELECTIONS

Browse:	Click here to list all the data available in the database.
Search:	Click here to go to the Search page.



DETAILED DESCRIPTION

This page is used to add a new data record to the FAQ Database and is only available to Supervisors. The Question, Response, and Category fields are seen directly by customers. The Keywords field is internal to the system and is only seen by department Supervisors.

Providing your customers with a well structured and richly populated FAQ database can be a very effective way of boosting customer satisfaction. Since every request for service made through the system is automatically matched against the FAQ, taking the time to develop this resource will not only help customers quickly find what they need, it also will significantly reduce the work load on Service Representatives.

PAGE LINKS

None.

USER INPUTS

When creating a new entry FAQ, the Question and Response fields are required - the other fields are optional.

Category:	Select the category of this entry from the available choices. **NOTE:** If you need to setup a new category, use the *Setup Categories* link provided on the Supervisor Home page.
Question:	Enter the question as it should appear to customers.
Response:	Enter the response to the question.
Keywords:	If possible, provide any additional keywords that might help other users find this information in the future. Note that it is not necessary to enter any words that already appear in any of the other input fields - these are automatically included. Use this field to include any other words that might be helpful.

OTHER HELP PAGES RELATING TO THIS TOPIC
FAQ Database Detail Page
FAQ Database Edit Page
FAQ Database List Page
FAQ Database Search Page

102

User Manual & Documentation

PAGE TITLE

FAQ Database Detail Page

SYNOPSIS

Shows the detail for a record in the FAQ database.

HELP TOPIC

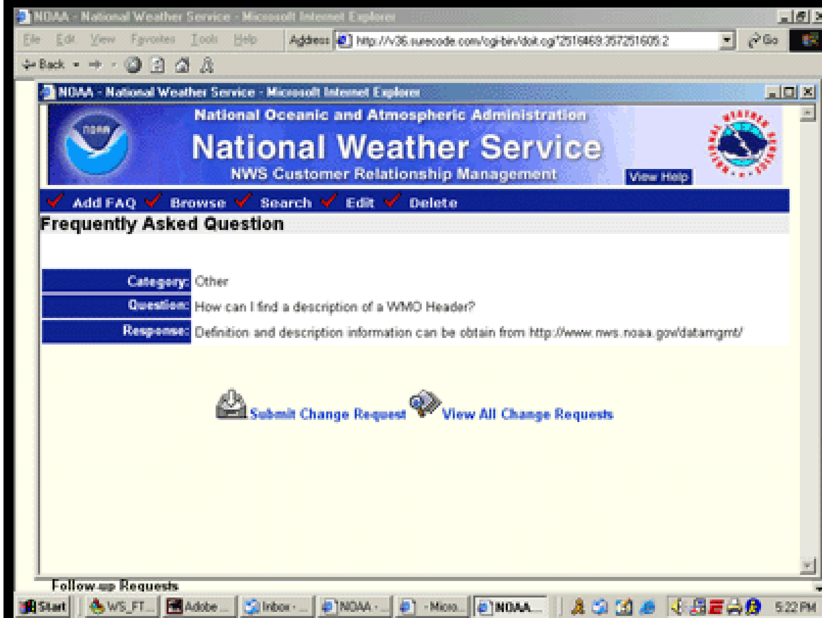
FAQ Database

USER CLASS

General Public
Supervisor

MENU SELECTIONS

Add FAQ:	Click here to add a new data record into the database.
Browse:	Click here to list the entire contents of the database.
Search:	Click here to open the Search page.
Edit:	Click here to edit the current page.
Delete:	Click here to delete the current listing from the database.



DETAILED DESCRIPTION

Category, Question and Response for frequently asked questions.

PAGE LINKS

None.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

FAQ Database Add Page

FAQ Database Edit Page

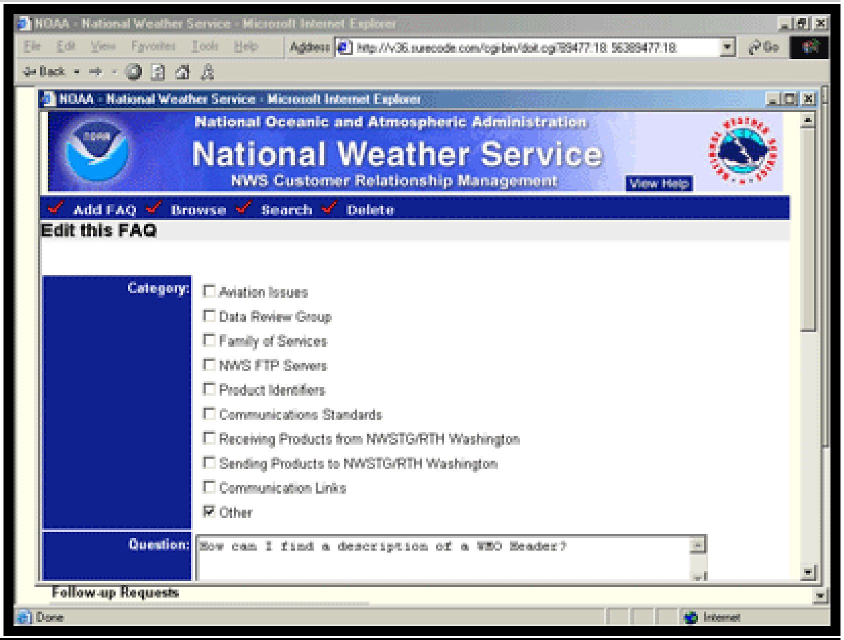
FAQ Database List Page

FAQ Database Search Page

User Manual & Documentation

PAGE TITLE

FAQ Database Edit Page



SYNOPSIS

Use this page to edit data in the FAQ Database.

HELP TOPIC

FAQ Database

USER CLASS

Supervisor

MENU SELECTIONS

Add FAQ:	Click here to add a new record into the database.
Browse:	Click here to list all the data available in the database.
Search:	Click here to go to the Search page.
Delete:	Click here to delete the current entry.

DETAILED DESCRIPTION

This page is used to edit a data record in the FAQ Database and is only available to Supervisors.

PAGE LINKS

None.

USER INPUTS

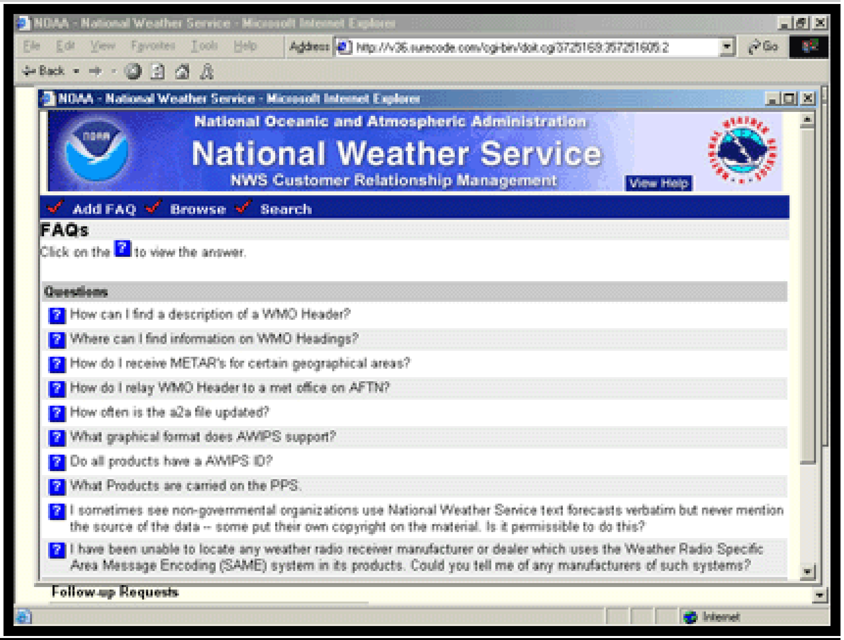
Category:	Select the category of this entry from the available choices. **NOTE:** If you need to setup a new category, use the *Setup Categories* link provided on the Supervisor Home page.
Question:	Enter the question as it should appear to customers.
Response:	Enter the response or resolution to the question.
Keywords:	If possible, provide any additional keywords that might help other users find this information in the future. Note that it is not necessary to enter any words that already appear in any of the other input fields - these are automatically included. Use this field to include any other words that might be helpful.

OTHER HELP PAGES RELATING TO THIS TOPIC
FAQ Database Add Page
FAQ Database Detail Page
FAQ Database List Page
FAQ Database Search Page

User Manual & Documentation

PAGE TITLE

FAQ Database List Page



SYNOPSIS

Lists matching items from the FAQ Database.

HELP TOPIC

FAQ Database

USER CLASS

General Public
Supervisor

MENU SELECTIONS

Add FAQ:	Click here to add a new data record into the database.
Browse:	Click here to list the entire contents of the database.
Search:	Click here to open the Search page.

DETAILED DESCRIPTION

Providing your customers with a well structured and richly populated FAQ database can be a very effective way of boosting customer satisfaction. Since *every* request for service made through the system is automatically matched against the FAQ, taking the time to develop this resource will not only help customers quickly find what they need, it also will significantly reduce the work load on Service Representatives.

The FAQ Database List Page is displayed after a search or when the Browse menu item is selected. When used with a search page it displays those items, if any, that match the user provided selection criteria. When used with the browse option, it lists the entire contents of the FAQ Database.

PAGE LINKS

? :	Click here to open the FAQ Database detail page for the listed question.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

FAQ Database Add Page

FAQ Database Detail Page

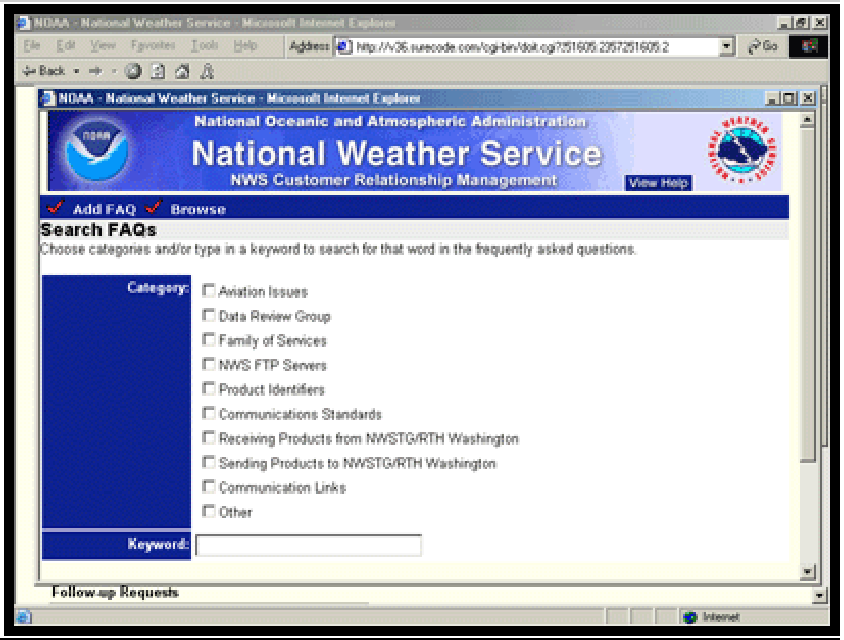
FAQ Database Edit Page

FAQ Database Search Page

User Manual & Documentation

PAGE TITLE

FAQ Database Search Page



SYNOPSIS

Use this page to search the FAQ database.

HELP TOPIC

FAQ Database

USER CLASS

General Public
Supervisor

MENU SELECTIONS

Add FAQ:	Click here to add a new FAQ to the database.
Browse:	Click here to list all FAQs in the database.

DETAILED DESCRIPTION

Customers are free to choose any combination of the provided selection criteria. The more criteria they select, the more focused their results will be.

To list *every* FAQ in the database, just leave all the input fields blank and click the **SEARCH** button.

PAGE LINKS

None.

USER INPUTS

After selecting one or more criteria from the options shown below, click the **SEARCH** button to list those matching FAQs.

Category:	Select one or more of the provided choices.
Keyword:	Search using the following keywords. Multiple words are combined using a logical *AND*. Keywords are matched against all available information fields as well as the Keywords provided on the Add and Edit pages.

OTHER HELP PAGES RELATING TO THIS TOPIC

FAQ Database Add Page

FAQ Database Detail Page

FAQ Database Edit Page

FAQ Database List Page

User Manual & Documentation

PAGE TITLE

Department Supervisor Home Page

SYNOPSIS

This is the user Home Page for the Supervisor user class. This page primarily includes links to administrative features and provides status information.

HELP TOPIC

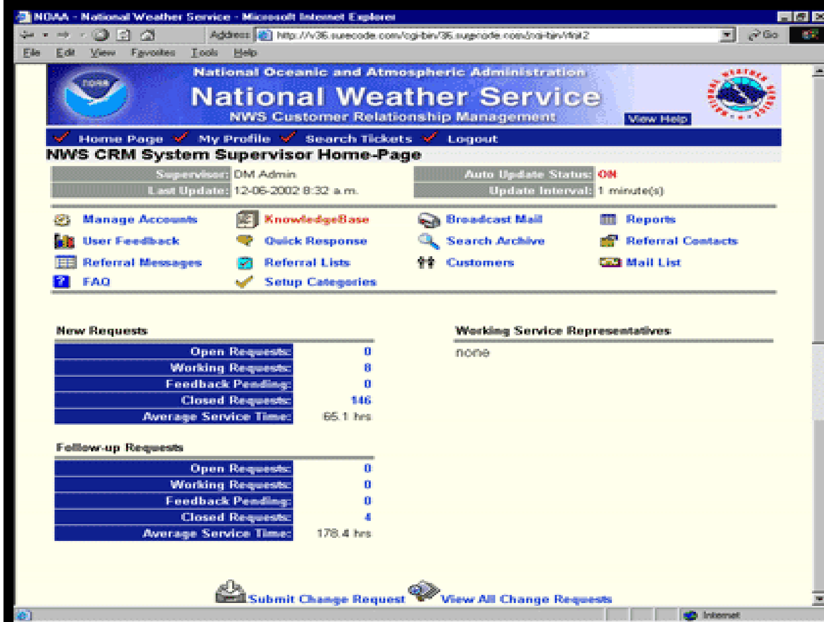
Home Pages

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the current page. This link is provided for menu consistency between pages.
My Profile:	Links to the user profile page for the current supervisor.
Search Tickets:	Links to the Search Page of the service request archive.
Logout:	Logs out the current user and closes their session.



DETAILED DESCRIPTION

Each department module supported by the NWS CRM systems includes its own virtual Supervisor Home page. Version 1.0 provides one for the DM module and another for the OS module. This prevents a supervisor in one department from making a change that could potentially impact the other.

The Supervisor Home page is divided into two major sections. The top portion gives access to a wide variety of administrative features - each is accessible by clicking on the provided link or icon. Once inside any of these, clicking on VIEW HELP again will open a separate help page that will provide additional details regarding that particular feature.

The bottom portion of the page provides real-time status information that can be used by the Supervisor to stay in constant touch with his or her group. The right side of the page provides a list of currently logged in Service Representatives along with the date and time when they signed on to the system. The left side of the page provides a snapshot of the ticket request pipeline for both New and Follow-Up requests. Clicking on any of the links provided in this section will produce a list of the actual service tickets behind the reported number. This makes it easy for a Supervisor to "dig a little deeper" if something doesn't look quite right.

PAGE LINKS

In addition to the links provided below, clicking on any of the numbers provided on the status report at the bottom of the page, will open to a detailed listing report.

Manage Accounts:	Click here to create and edit user accounts for your office.
Knowledge Base:	Click here to create and edit the Knowledge Base archive.
Broadcast Mail:	Click here to build and send a broadcast mail list.
Reports:	Provides access to a wide variety of reports.
User Feedback:	Provides access to the customer feedback database built from survey responses.

USER INPUTS

None.

Quick Response:	Click here to setup system level Quick Response answers.
Search Archive:	Click here to search the Ticket Request database.
Referral Contacts:	Click here to view, edit and delete contacts from the Referral Database.
Referral Messages:	Click here to view, edit and delete from the Referral Message Database.
Referral Lists:	Click here to view, edit and delete from the Referral Lists Database.
Customers:	Click here to view and edit the Customer database.
Mail List:	Click here to view and edit the the Mail List database.
FAQ:	Click here to add, edit, and delete data from the FAQ database.
Setup Categories:	Use this link to setup the various selection categories used throughout the system.

OTHER HELP PAGES RELATING TO THIS TOPIC

Executive Level Home Page

Service Representative Home Page

User Manual & Documentation

PAGE TITLE

Executive Level Home Page

SYNOPSIS

This is the user Home page for the Executive user class. This page primarily includes links to reports and customer feedback.

HELP TOPIC

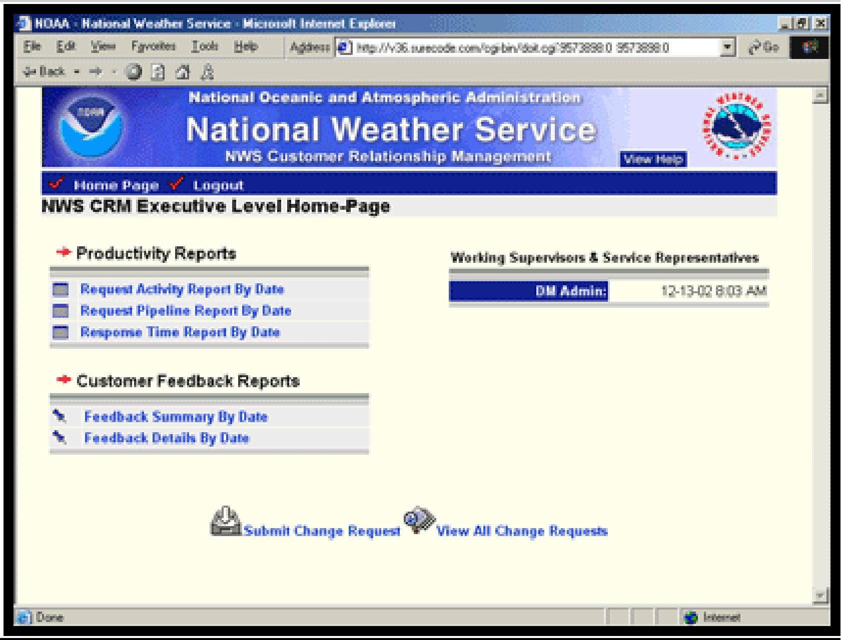
Home Pages

USER CLASS

Executive Reports

MENU SELECTIONS

Home Page:	Links to the current page. This link is provided for menu consistency between pages.
Logout:	Logs out the current user and closes their session.



DETAILED DESCRIPTION

Here is where the Executive Level user will find access to enterprise-wide data and feedback. This information is collected and made available on a *realtime basis* as customer requests are entered and serviced.

This page is divided into two major sections. The left portion provides access to the reports - each is accessible by clicking on the provided link. Once inside any of these, clicking on VIEW HELP again will open a separate help page that will provide additional details regarding that particular report.

The right portion of the page provides a current snapshot of logged in Service Representatives and Supervisors. This information is listed along with the date and time when they signed on to the system.

PAGE LINKS

Productivity Reports

Request Activity Report By Date:	Reports on ticket activity in the selected date range. A ticket is active within a given date range if there has been any change within its status.
Request Pipeline Report By Date:	Reports on pipeline activity in the selected date range. A ticket is included in this report if it was created within the indicated date range irrespective of if there has been any change in its status.
Response Time Report By Date:	Reports on response time in the selected date range. In order for a ticket to be included in this report, it must have been closed within the selected date range.

USER INPUTS

None.

Customer Feedback Reports

Feedback Summary By Date:	Customer feedback summary for a given date range. This report presents results in a graphical format.
Feedback Details By Date:	Customer feedback details for a given date range. This report presents customer feedback in a text format and with complete details.

OTHER HELP PAGES RELATING TO THIS TOPIC

Department Supervisor Home Page

Service Representative Home Page

User Manual & Documentation

PAGE TITLE

Service Representative Home Page

SYNOPSIS

Home page for the Service Representative user class.

HELP TOPIC

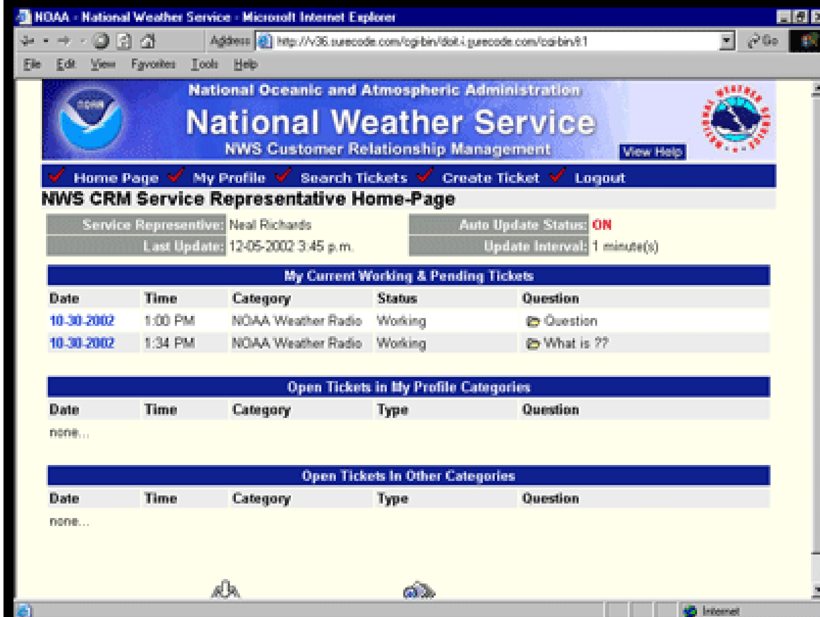
Home Pages

USER CLASS

Service Representative

MENU SELECTIONS

Home Page:	Links to the current page. This link is provided for menu consistency between pages.
My Profile:	Links to your User Profile page. Click here to see and edit your service categories.
Search Tickets:	Click here to search the Request Ticket database.
Create Ticket:	Click here to create a new Request Ticket on behalf of the customer.
Logout:	Click here to log out and close your session.



DETAILED DESCRIPTION

Service Representatives are **backbone** of the NWS CRM system. As a Service Representative, it is your charge to ensure that customer requests are addressed in an effective and timely manner - while making sure that nothing ever *falls through the cracks.*

Trying to accomplish this goal by relying solely on email poses significant challenges. Although email is very effective at *moving* data, it lacks the structural, workflow, and reporting capabilities necessary to remain organized as the volume of customer requests increase beyond the smallest levels. Email also lacks any type of built-in capability to capture and reuse knowledge between users. As a result, you very likely waste significant amounts of time every day addressing and retyping issues that have already been resolved *many times before* by other members of your team.

The NWS CRM system was designed and built to address these shortcomings of the email-based approach. It includes the features you need to reduce the time and effort you spend resolving customer issues while enhancing your ability to get requests and issues turned around quickly. This is a win for you and your customers.

The system pulls together many of the resources that you will need and makes them all available in one place. As you become more familiar with the various features of the system this will become very evident.

It all starts with your Home page. This is the first page you will see every time you login into the system. Every user defined within the system has their own personalized version of this page – no two are exactly alike. Your Home page organizes and prioritizes your tasks based on your user profile. These are grouped into *action items* and placed in one of three in-boxes based on priority. These are shown in the center of the page and are described below.

My Current Working & Pending Tickets

The tickets listed in this first inbox are your **highest priority** items. These are customer requests that you have already started working on - but for whatever reason - could not resolve immediately. Maybe you are researching the answer; maybe you need to get information from a third party; or maybe you need additional clarification from the customer. Whatever the circumstances - *once you start working on a ticket, that ticket is only visible to you and your Supervisor*. This is done to ensure that two Service Representatives are not working on the same issues at the same time. Thus, it is absolutely critical that you not let tickets accumulate in this first section.

Open Tickets in My Profile Categories

Every Service Representative has a user profile that defines one or more categories of user questions that they are responsible for responding to. To see and edit *your* list, click on the My Profile menu link. Customers are required to indicate a category as they make requests for service. By matching requests with user profiles, the system routes particular issues and questions to the correct Service Representatives. All of the tickets that need to be serviced and match your expertise profile are listed in this second inbox.

Open Tickets In Other Categories

Even though a request does not match your particular profile, as a Service Representative you have the ability to review it and respond to it if you can. All of the customer requests that require service that don't match your user profile are listed in this third inbox on your Home page.

PAGE LINKS		USER INPUTS
Date:	This link is available from any ticket in any of the three in-boxes. It opens the Request Detail page for the list ticket.	None.

OTHER HELP PAGES RELATING TO THIS TOPIC
Department Supervisor Home Page
Executive Level Home Page

User Manual & Documentation

PAGE TITLE

Knowledge Base Add Page

SYNOPSIS

Use this page to add a new entry into the Knowledge Base database.

HELP TOPIC

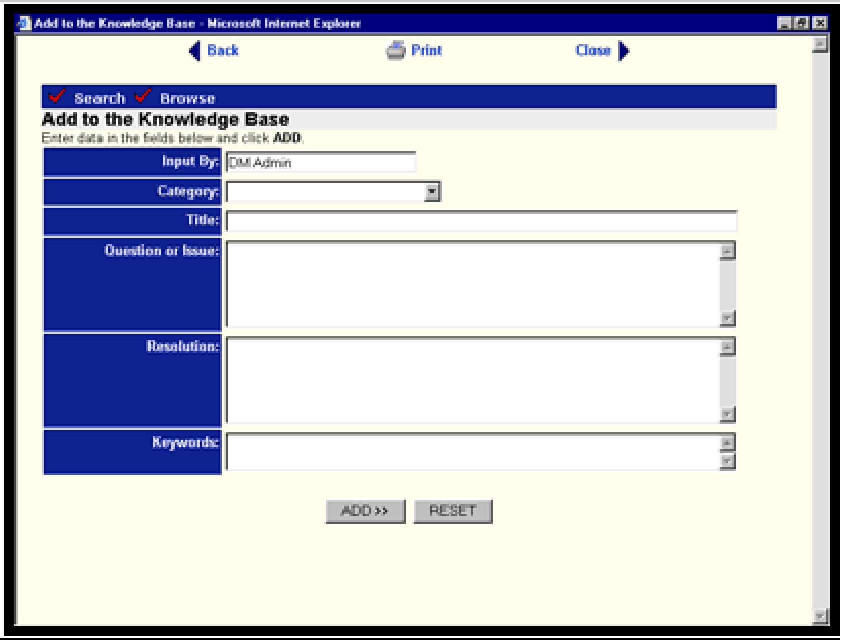
Knowledge Base

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Search:	Click here to go to the Search page.
Browse:	Click here to list all the data available in the database.



DETAILED DESCRIPTION

This page is used to add a new data record to the Knowledge Base database. It is available to both Service Representatives and Supervisors.

Although either type of user can create a new entry, the system will prevent Service Representatives from making any changes or deleting an entry after it has been in the system for one hour. This features gives Service Representatives the ability to make edits and corrections while adding something new, but prevents them from making any changes thereafter. Only a Supervisor can edit or delete an entry after the initial grace period expires.

PAGE LINKS

None.

USER INPUTS

When creating a new entry, note that all of the provided fields are required except for the Keywords field.

Input By:	Prefilled to indicate the user entering the new record.
Category:	Select the category from the available options.
Title:	Provide the title of the new entry.
Question or Issue:	Indicates the question or issue that your new entry resolves.
Resolution:	Enter the information or resolution.
Keywords:	If possible, provide any additional keywords that might help other users find this information in the future. Note that it is not necessary to enter any words that already appear in any of the other input fields - these are automatically included. Use this field to include any other words that might be helpful.

OTHER HELP PAGES RELATING TO THIS TOPIC
Knowledge Base Detail Page
Knowledge Base Edit Page
Knowledge Base List Page
Knowledge Base Search Page

21

User Manual & Documentation

PAGE TITLE

Knowledge Base Detail Page

SYNOPSIS

Shows the detail for a record in the Knowledge Base database.

HELP TOPIC

Knowledge Base

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Add:	Click here to add a new data record into the database.
Search:	Click here to open the Search page.
Browse:	Click here to list the entire contents of the database.
Edit:	Click here to edit the current page.
Delete:	Click here to delete the current listing from the database.

DETAILED DESCRIPTION

None.

PAGE LINKS

Select Data:	Click on this link to insert the Resolution data from this page directly into the Details field of the Service Request Page. If no data is highlighted on the Knowledge Base page, the entire contents of the Resolution field is inserted. If only a portion of the Resolution data is desired, highlight the text of interest and only that data will be inserted back. If there is any data already entered in the Detail field, any data inserted via this link will be appended to the data already present. Note that this feature is only available when the Knowledge Base page is opened directly from the Service Request page. This feature can be used by Service Representatives to

USER INPUTS

None

	eliminate unnecessary retyping of information.

OTHER HELP PAGES RELATING TO THIS TOPIC
Knowledge Base Add Page
Knowledge Base Edit Page
Knowledge Base List Page
Knowledge Base Search Page

User Manual & Documentation

PAGE TITLE

Knowledge Base Edit Page

SYNOPSIS

Use this page to edit a Knowledge Base listing.

HELP TOPIC

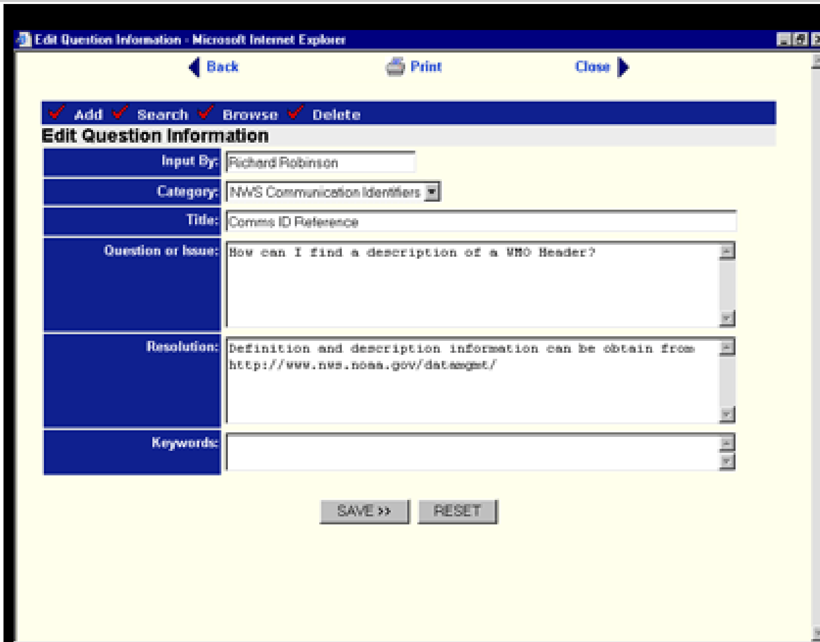
Knowledge Base

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Add:	Click here to add a new data record into the database.
Search:	Click here to open the Search page.
Browse:	Click here to list the entire contents of the database.
Delete:	Click here to delete the current listing from the database.



DETAILED DESCRIPTION

Service Representatives can edit within the first hour after creating a new entry. Once this grace period expires, this feature is only available to Supervisors.

PAGE LINKS

None.

USER INPUTS

When editing a listing note that all of the provided fields are required except for the Keywords field.

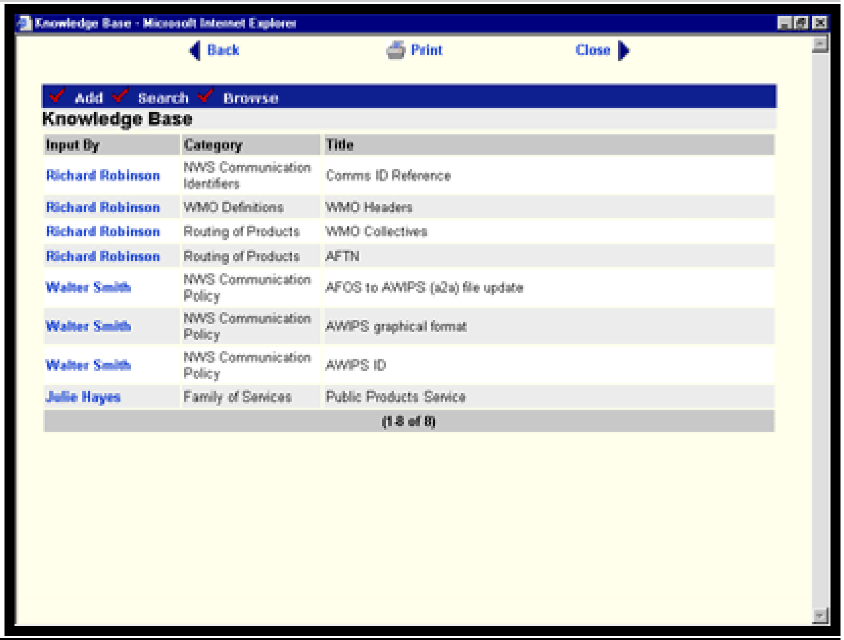
Input By:	Indicates the user who created the listing.
Category:	Indicates the category of the listing.
Title:	Indicates the title of the listing.
Question or Issue:	Indicates the question or issue that the listing addresses.
Resolution:	Provides the resolution to the issues or question.
Keywords:	Additional keywords that might help other users find this information in the future. Note that it is not necessary to enter any words that already appear in any of the other input fields - these are automatically included. Use this field to include any other words that might be helpful.

OTHER HELP PAGES RELATING TO THIS TOPIC
Knowledge Base Add Page
Knowledge Base Detail Page
Knowledge Base List Page
Knowledge Base Search Page

User Manual & Documentation

PAGE TITLE

Knowledge Base List Page



SYNOPSIS

Lists matching items from the Knowledge Base database.

HELP TOPIC

Knowledge Base

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Add:	Click here to add a new data record into the database.
Search:	Click here to open the Search page.
Browse:	Click here to list the entire contents of the database.

DETAILED DESCRIPTION

The Knowledge Base List Page is displayed after a search or when the Browse menu item is selected. When used with a search page, it displays the Knowledge base items, if any, that match the user provided selection criteria. When used with the browse option, it lists the entire contents of the Knowledge Base database.

PAGE LINKS

Input By:	Click here to open the Knowledge base detail page for the listed item.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Knowledge Base Add Page

Knowledge Base Detail Page

Knowledge Base Edit Page

Knowledge Base Search Page

User Manual & Documentation

PAGE TITLE

Knowledge Base Search Page

SYNOPSIS

Use this page to search the Knowledge Base for information.

HELP TOPIC

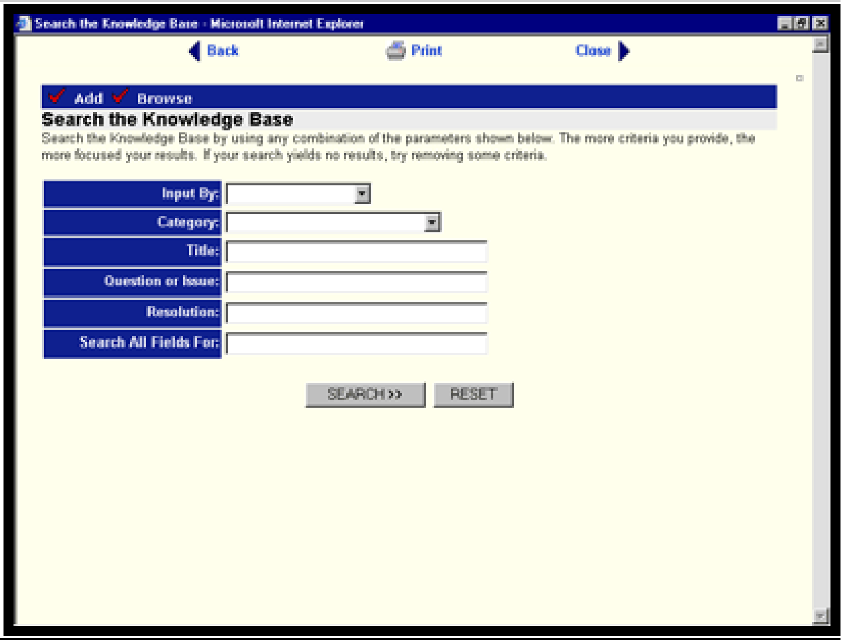
Knowledge Base

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Add:	Click here to add a new listing.
Browse:	Click here to list all entries in the database.



DETAILED DESCRIPTION

This page gives you great flexibility in searching the Knowledge Base database. You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your results will be. To list every listing in the Knowledge Base database, just leave all the input fields blank and click the **SEARCH** button.

PAGE LINKS

None

USER INPUTS

Input By:	List entries that were created by the selected user.
Category:	List entries with the selected category
Title:	List entries with the entered title or fragment.
Question or Issue:	List entries with the following word in the Question or Issue field.
Resolution:	List entries with the following word in the Resolution field.
Search All Fields For:	Search using the following keywords. Multiple words are combined using a logical *AND*. Keywords are matched against all available information fields as well as any Keywords provided on the Add and Edit pages.

OTHER HELP PAGES RELATING TO THIS TOPIC

Knowledge Base Add Page

Knowledge Base Detail Page

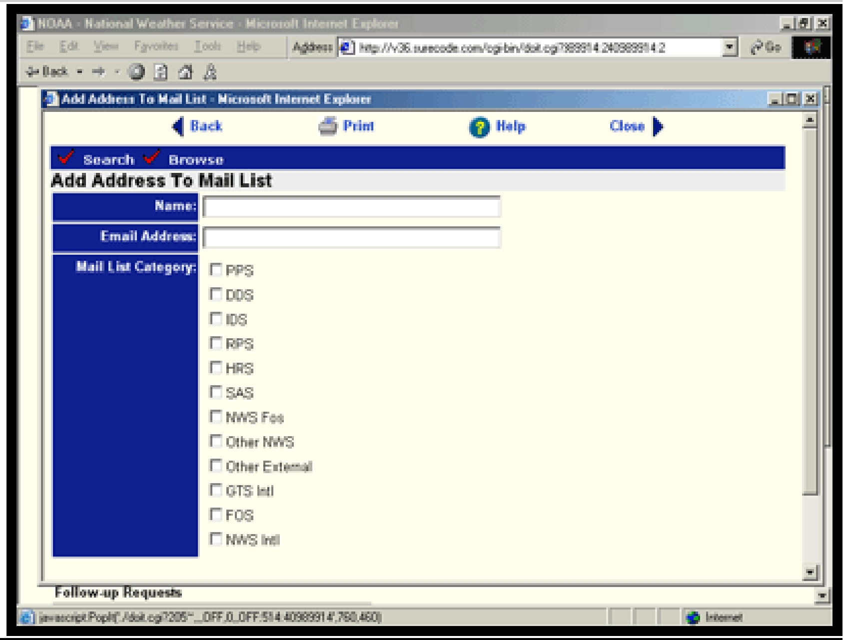
Knowledge Base Edit Page

Knowledge Base List Page

User Manual & Documentation

PAGE TITLE

Mail List Database Add Page



SYNOPSIS

Used to add a record in the database.

HELP TOPIC

Mail List

USER CLASS

Supervisor

MENU SELECTIONS

Search:	Click here to open the Search page.
Browse:	Click here to list the entire contents of the database.

DETAILED DESCRIPTION

None.

PAGE LINKS

None.

USER INPUTS

The Email Address field is mandatory - all other fields are optional.

Name:	The name of the mail recipient.
Email Address:	The email address of the mail recipient.
Mail List Category:	Select from one or more of the indicated categories.

OTHER HELP PAGES RELATING TO THIS TOPIC

Mail List Database Detail Page

Mail List Database Edit Page

Mail List Database List Page

Mail List Database Search Page

User Manual & Documentation

PAGE TITLE

Mail List Database Detail Page

SYNOPSIS

Shows the detail for a record in the database.

HELP TOPIC

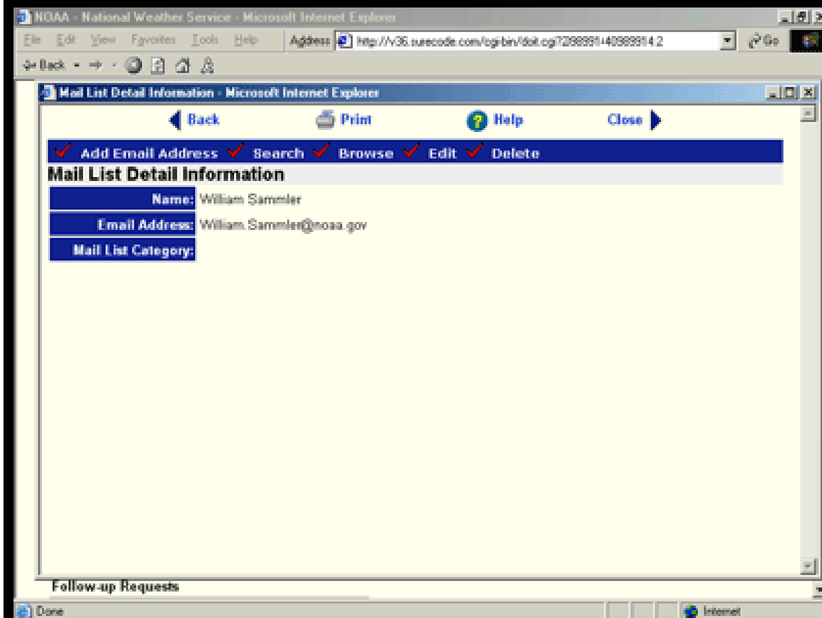
Mail List

USER CLASS

Supervisor

MENU SELECTIONS

Add Email Address:	Click here to add a new data record into the database.
Search:	Click here to open the Search page.
Browse:	Click here to list the entire contents of the database.
Edit:	Click here to edit the current page.
Delete:	Click here to delete the current listing from the database.



DETAILED DESCRIPTION

None.

PAGE LINKS

None.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Mail List Database Add Page

Mail List Database Edit Page

Mail List Database List Page

Mail List Database Search Page

User Manual & Documentation

PAGE TITLE

Mail List Database Edit Page

SYNOPSIS

Used to edit a record in the database.

HELP TOPIC

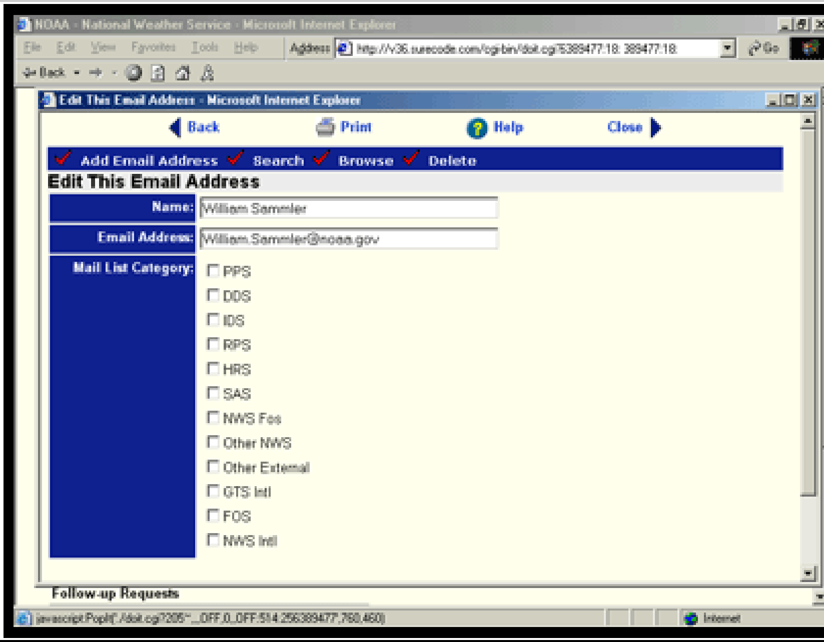
Mail List

USER CLASS

Supervisor

MENU SELECTIONS

Add Email Address:	Click here to add a new data record into the database.
Search:	Click here to open the Search page.
Browse:	Click here to list the entire contents of the database.
Delete:	Click here to delete the current listing from the database.



DETAILED DESCRIPTION

None.

PAGE LINKS

None.

USER INPUTS

Name:	The name of the mail recipient.
Email Address:	The email address of the mail recipient.
Mail List Category:	Select from one or more of the indicated categories.

OTHER HELP PAGES RELATING TO THIS TOPIC

Mail List Database Add Page

Mail List Database Detail Page

Mail List Database List Page

Mail List Database Search Page

User Manual & Documentation

PAGE TITLE

Mail List Database List Page

SYNOPSIS

Lists contacts from the Mail List database.

HELP TOPIC

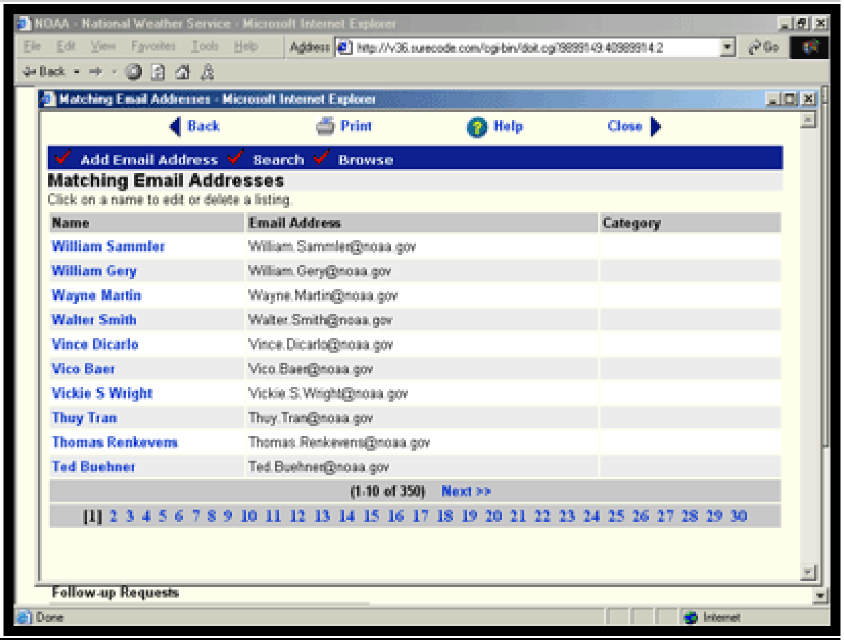
Mail List

USER CLASS

Supervisor

MENU SELECTIONS

Add Email Address:	Click here to add a new address into the database.
Search:	Click here to open the Search page.
Browse:	Click here to list the entire contents of the database.



DETAILED DESCRIPTION

The Mail List database List Page is displayed after a search or when the Browse menu item is selected. When used with a search page, it displays the database items that match the user provided selection criteria. When used with the browse option, it lists the entire contents of the database.

PAGE LINKS

Name:	Click here to open the detail page for the listed recipient.

USER INPUTS

OTHER HELP PAGES RELATING TO THIS TOPIC

- Mail List Database Add Page
- Mail List Database Detail Page
- Mail List Database Edit Page
- Mail List Database Search Page

User Manual & Documentation

PAGE TITLE

Mail List Database Search Page

SYNOPSIS

Use this page to search the Mail List database.

HELP TOPIC

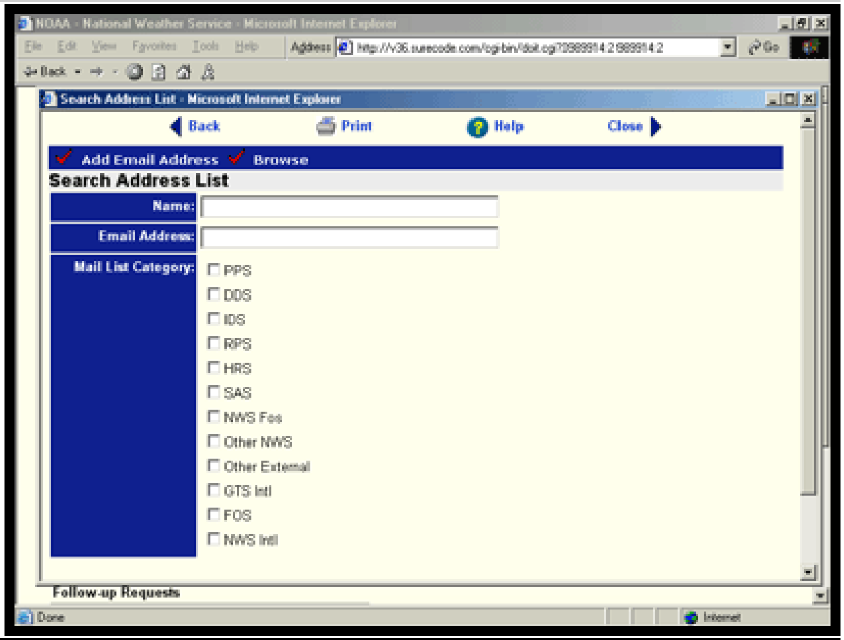
Mail List

USER CLASS

Supervisor

MENU SELECTIONS

Add Email Address:	Click here to add a new record to the database.
Browse:	Click here to list all contacts.



DETAILED DESCRIPTION

Use this page to search the Mail List database. The more criteria you select, the more focused your results will be.

To list *every* contact in the database, just leave all the input fields blank and click the **SEARCH** button.

PAGE LINKS

None

USER INPUTS

After selecting one or more criteria from the options listed below, click the **SEARCH** button to see those matching listings.

Name:	Search using the entered name or name fragment.
Email Address:	Search using the entered email address or fragment.
Mail List Category:	Search using one or more of the selected categories.

OTHER HELP PAGES RELATING TO THIS TOPIC

Mail List Database Add Page

Mail List Database Detail Page

Mail List Database Edit Page

Mail List Database List Page

User Manual & Documentation

PAGE TITLE

Manage User Accounts

SYNOPSIS

The Manage User Accounts page is used to add, edit, and delete Service Representative and Supervisor user accounts for your department.

HELP TOPIC

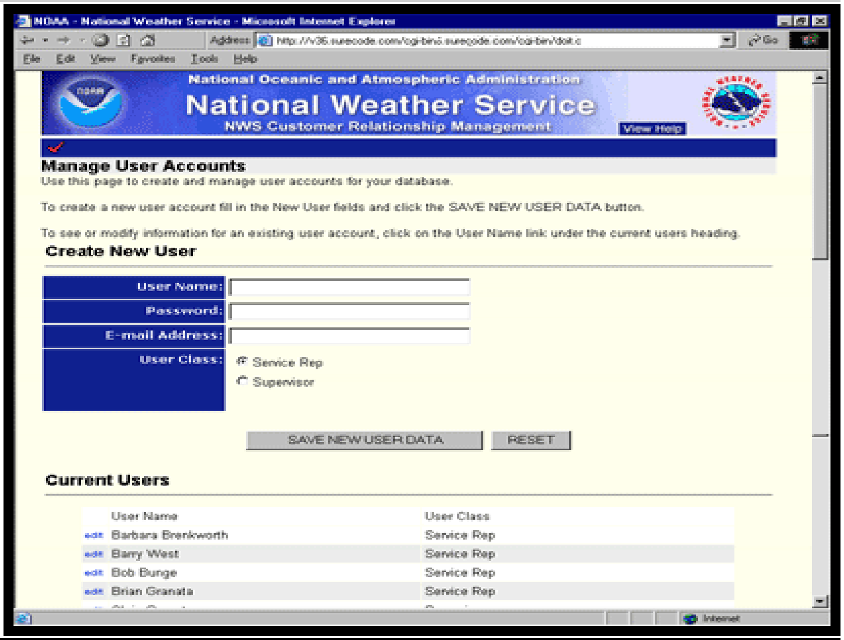
Manage Accounts

USER CLASS

Supervisor

MENU SELECTIONS

None



DETAILED DESCRIPTION

This page gives the department level Supervisor the ability to manage accounts for their users. The top portion of the page provides input fields for creating new accounts. The bottom portion of the page lists the user names of all the currently defined users. To view or edit the current settings for a given user, click on the edit link next to their name.

PAGE LINKS

edit:	There is an edit link provided next to each currently defined account. Use this link to make changes or to delete an existing account.

USER INPUTS

The following input fields are to be used when creating a new user account. Note that all user names and passwords are case sensitive.

User Name:	The system user name for the new account. This must be unique for each user.
Password:	The password for the new account. Please make sure that you define hard to guess passwords. Since the system usually sits outside the enterprise firewall, hackers may attempt to gain entry into the system via this access point. A good password is the only thing keeping them out.
E-mail Address:	The user's email address. This field is very important because it provides the user with a way for them to retrieve a lost password directly via email without any help from the department Supervisor.
User Class:	This field establishes the type of account to create. Select either Service Rep to create a Service Representative account or Supervisor to create a new Supervisor account for your department.

OTHER HELP PAGES RELATING TO THIS TOPIC
System User Login Page
View & Edit User Account

14

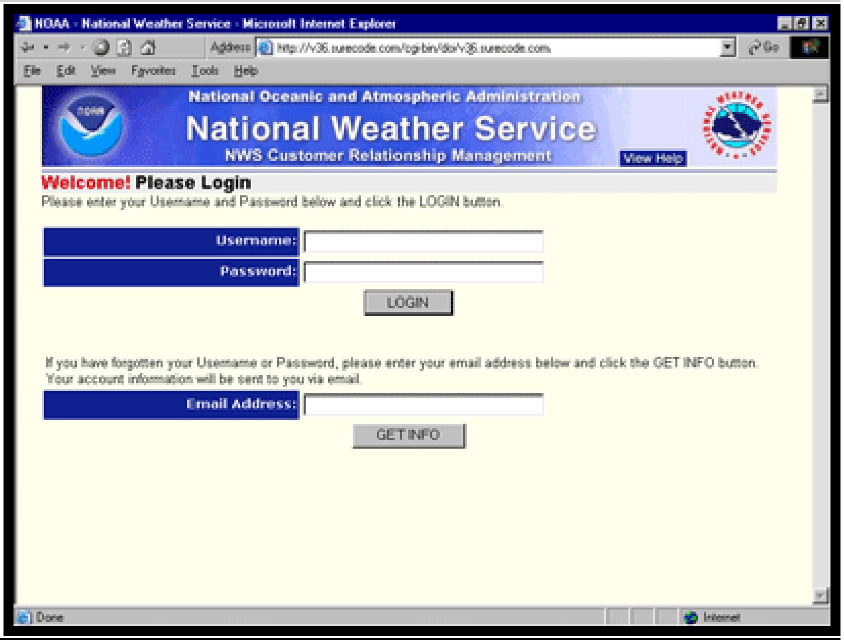
User Manual & Documentation

PAGE TITLE

System User Login Page

SYNOPSIS

Login page for Managers, Supervisors, and Service Representatives.



HELP TOPIC

Manage Accounts

USER CLASS

Service Representative
Supervisor
Executive Reports

MENU SELECTIONS

None.

DETAILED DESCRIPTION

A valid Username and Password are required to log into the system. Although the login pages look identical, there are separate *entry points* for users of the Data Management, Office of Services, and Executive Reporting modules. If you are having trouble logging into the system, please make sure you are using the correct link.

If you are having trouble remembering your password, enter your email address in the provided space and click the **GET INFO** button. The necessary account information will be sent to you via email.

PAGE LINKS

None.

USER INPUTS

After you enter your username and password, click the LOGIN button to log into the system.

Username:	Username for user.
Password:	Password for user.
Email Address:	Place your email address here and click the **GET INFO** button to have your username and password sent via email.

OTHER HELP PAGES RELATING TO THIS TOPIC

Manage User Accounts

View & Edit User Account

User Manual & Documentation

PAGE TITLE

View & Edit User Account

SYNOPSIS

This page is used by the department Supervisor to view and edit the account information of a particular user.

HELP TOPIC

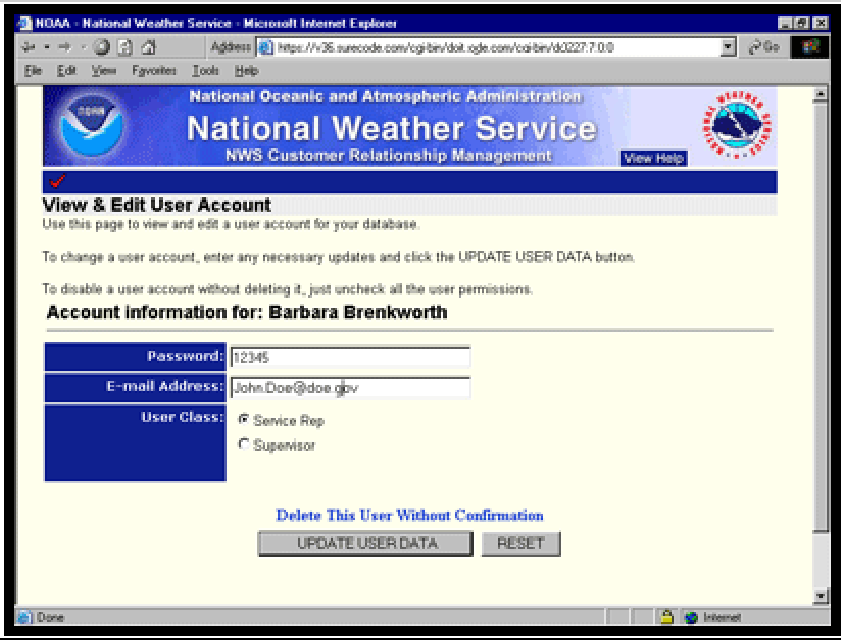
Manage Accounts

USER CLASS

Supervisor

MENU SELECTIONS

None.



DETAILED DESCRIPTION

None.

PAGE LINKS

Delete User: Use this link to permanently delete a user account from the system. Note that deleting a user account may impact that user's performance data in the Reports module. To prevent access to the system, and avoid any loss of their performance data, it would be better to change the user's password and email address rather than to delete their account.

USER INPUTS

The following provides details regarding the available input fields. After you make any necessary edits, click the **UPDATE USER DATA** button to save your changes.

Password: The current password is provided in this field. To change it to something else, enter the new password here.

E-mail Address: The current email address is provided in this field. To update this field, enter the new address here. Note that users are able to retrieve their passwords via their email address. Thus, to fully disable a user account you need to change **both** their password and email address fields.

User Class: This field defines the user class. To change the class, select either Service Rep or Supervisor.

OTHER HELP PAGES RELATING TO THIS TOPIC

Manage User Accounts

System User Login Page

User Manual & Documentation

PAGE TITLE

My Profile Detail Page

SYNOPSIS

Use this page to view your user profile.

HELP TOPIC

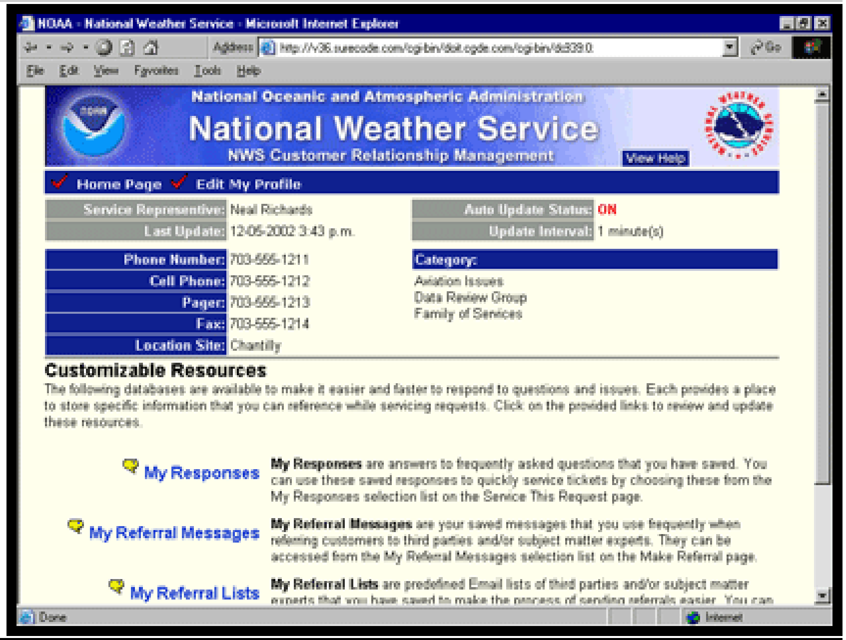
My Profiles

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor or Service Representative home page.
Edit My Profile:	Click here to modify the Profile.



DETAILED DESCRIPTION

This page lists contact information for Supervisors or Service Representatives. For Service Representatives it also lists the categories for which a Service Representative is responsible to respond to.

PAGE LINKS

The following links are only available to Service Representatives.

My Responses:	Your library of saved answers to frequently asked questions. Use these responses to quickly service tickets by choosing these from the My Responses selection list on the Service This Request page.
My Referral Messages:	Your library of saved messages for making referrals. Access this database from the My Referral Messages selection list on the Make Referral page.
My Referral Lists:	Your library of saved referral lists for making referrals. Access this database from the My Referral Lists selection list on the Make Referral page.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

My Profile Edit Page

User Manual & Documentation

PAGE TITLE

My Profile Edit Page

SYNOPSIS

Modify the contents of a profile.

HELP TOPIC

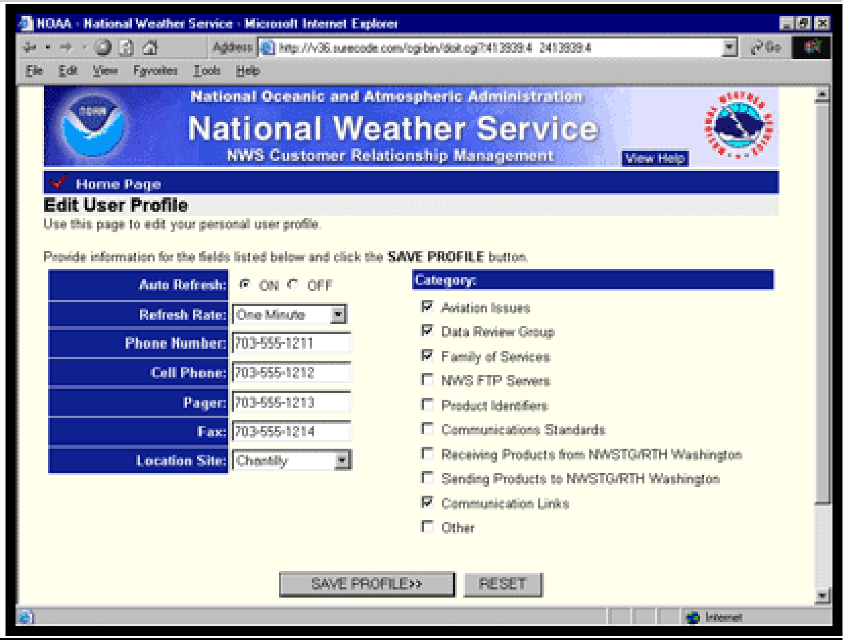
My Profiles

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor or Service Rep home page.



DETAILED DESCRIPTION

Used to modify the profile of a Supervisor or Service Representative. The Category field pertains solely to Service Representatives and is used to determine what type of requests they will be responsible for.

PAGE LINKS

None

USER INPUTS

The following provides details regarding the available input fields. After you make any necessary edits, click the SAVE PROFILE button to save your changes.

Auto Refresh:	Turns automatic browser refresh on or off for home page.
Refresh Rate:	How often the page refreshes if auto refresh is on.
Phone Number:	Phone number of profile holder.
Cell Phone:	Cell phone number of profile holder.
Pager:	Pager of profile holder.
Fax:	Fax number of profile holder.
Location Site:	Location of profile holder.
Category:	Categories that a service representative is responsible for.

OTHER HELP PAGES RELATING TO THIS TOPIC

My Profile Detail Page

User Manual & Documentation

PAGE TITLE

Notes Add Page

SYNOPSIS

Use this page to add a note to a request ticket.

HELP TOPIC

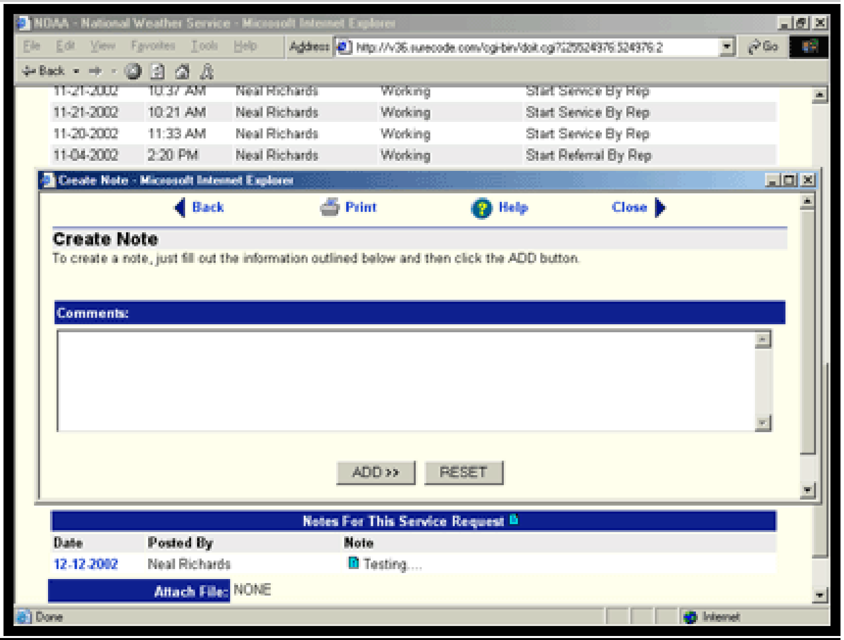
Notes

USER CLASS

Service Representative

MENU SELECTIONS

None.



DETAILED DESCRIPTION

Service Representatives can add an unlimited number of notes to any given service request ticket. Each note is available as a link of the Request Detail page.

PAGE LINKS

None.

USER INPUTS

The following provides details regarding the available input fields. After you make any necessary edits, click the ADD button to save your changes.

Comments:	Comments concerning this request.

OTHER HELP PAGES RELATING TO THIS TOPIC

Notes Detail Page

Notes Edit Page

User Manual & Documentation

PAGE TITLE

Notes Detail Page

SYNOPSIS

Use this page to view a note that is attached to a request ticket.

HELP TOPIC

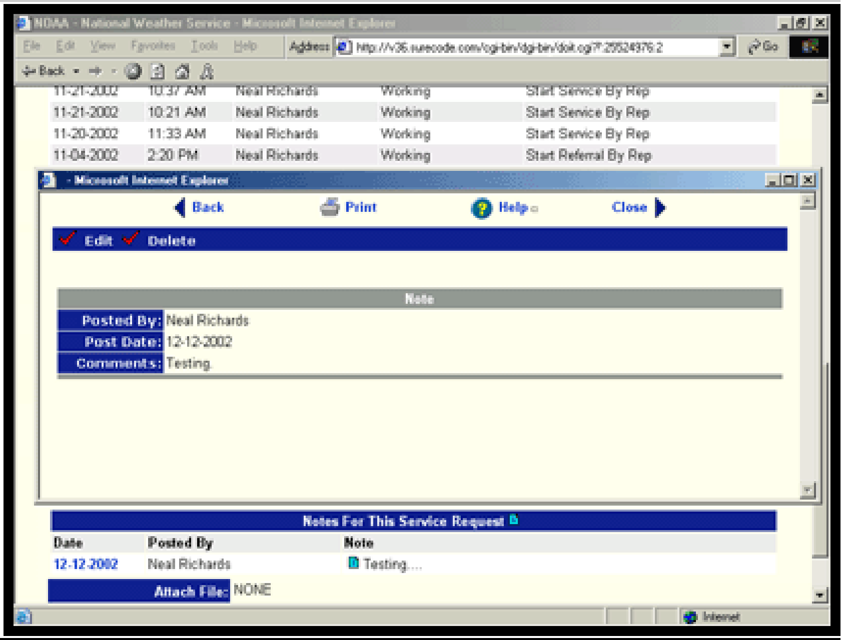
Notes

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Edit:	Edit this note.
Delete:	Delete this note.



DETAILED DESCRIPTION

None.

PAGE LINKS

None.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Notes Add Page

Notes Edit Page

User Manual & Documentation

PAGE TITLE

Notes Edit Page

SYNOPSIS

Use this page to edit a note that is attached to a request ticket.

HELP TOPIC

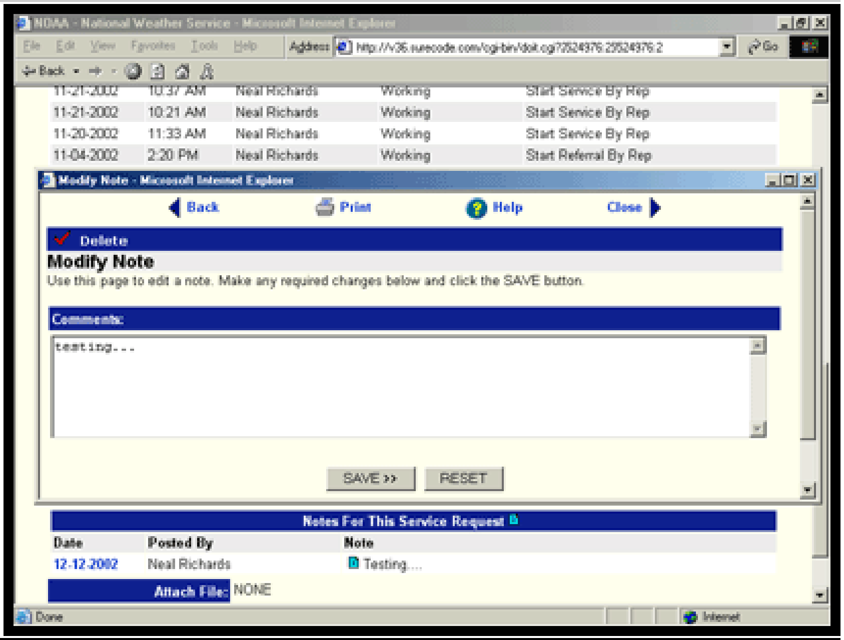
Notes

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Delete: Delete this note.



DETAILED DESCRIPTION

Service Representatives can edit within the first hour after creating a new note. Once this grace period expires, this feature is only available to Supervisors.

PAGE LINKS

None

USER INPUTS

The following provides details regarding the available input fields. After you make any necessary edits, click the SAVE button to save your changes.

Comments: Comments for this note.

OTHER HELP PAGES RELATING TO THIS TOPIC

Notes Add Page

Notes Detail Page

User Manual & Documentation

PAGE TITLE

My Response Add Page

SYNOPSIS

Use this page to add a new entry into the Response database.

HELP TOPIC

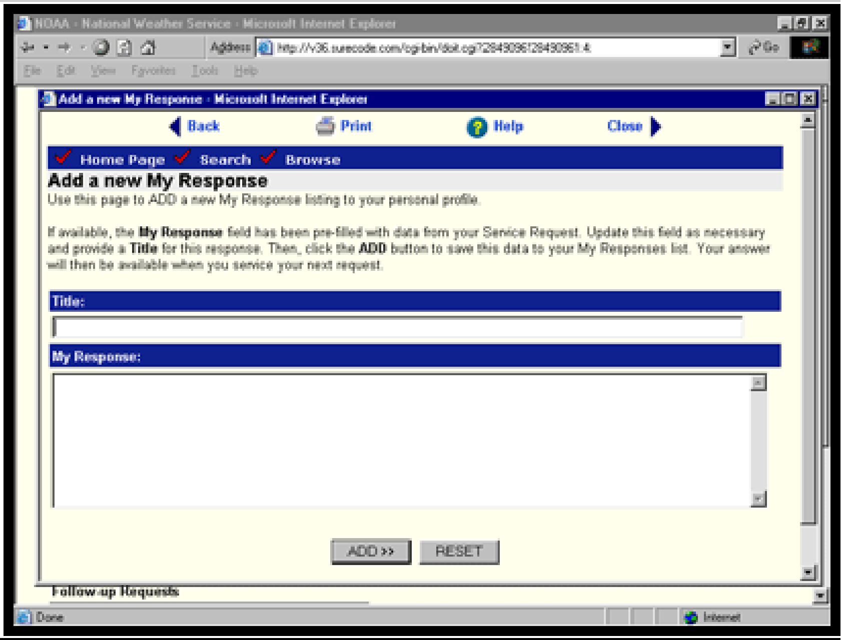
Quick Response

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Search:	Click here to go to the Search page.
Browse:	Click here to list all the data available in the database.



DETAILED DESCRIPTION

This page is used to add a new data record to the Response database. This is available to both Service Representatives and Supervisors.

Although either type of user can create a new entry, the system will prevent Service Representatives from making any changes or deleting an entry after it has been in the system for one hour. This feature gives Service Representatives the ability to make edits and corrections while adding something new, but prevents them from making any changes thereafter. Only a Supervisor can edit or delete an entry after the initial grace period expires.

PAGE LINKS

None

USER INPUTS

The following provides details regarding the available input fields. After you provide the necessary data, click the **ADD** button to save your response.

Title:	Indicates the title of the listing.
My Response:	Indicates the response of the listing.

OTHER HELP PAGES RELATING TO THIS TOPIC

My Response Detail Listing

My Response Edit Page

My Response List Page

My Response Search Page

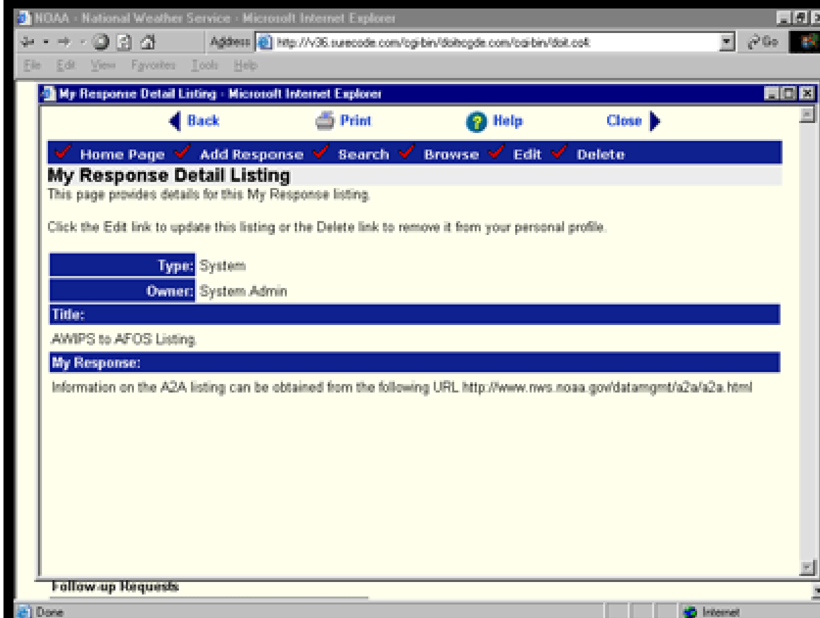
User Manual & Documentation

PAGE TITLE

My Response Detail Listing

SYNOPSIS

Shows the detail for a record in the response database.



HELP TOPIC

Quick Response

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Home Page:	Click here to go to your Home page.
Add Response:	Click here to add a new data record into the database.
Search:	Click here to go to the Search page.
Browse:	Click here to list all the data available in the database.
Edit:	Click here to edit the current page.
Delete:	Click here to delete the current listing from the database.

DETAILED DESCRIPTION

Shows the owner and type along with the title and response information of the quick response.

PAGE LINKS

None.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

My Response Add Page

My Response Edit Page

My Response List Page

My Response Search Page

User Manual & Documentation

PAGE TITLE

My Response Edit Page

SYNOPSIS

Use this page to edit a quick response listing.

HELP TOPIC

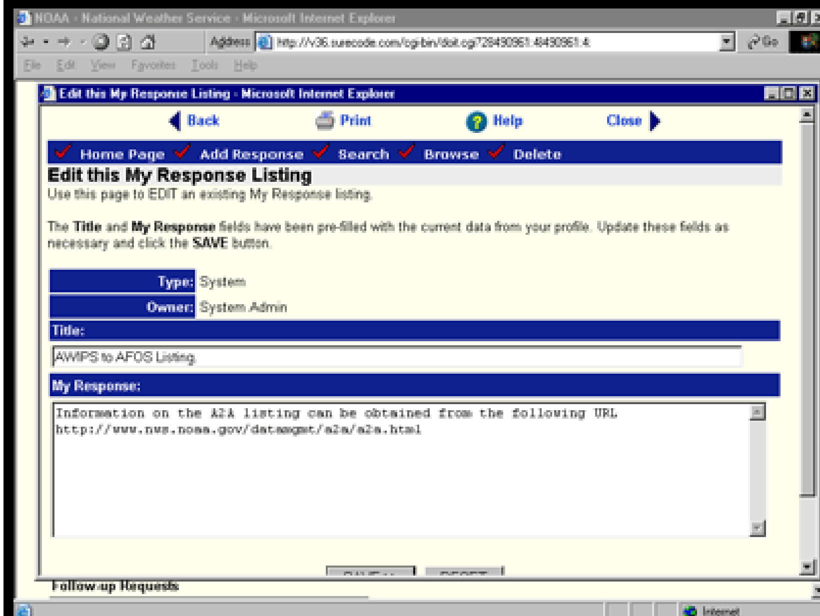
Quick Response

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Home Page:	Click here to go to your Home page.
Add Response:	Click here to add a new data record into the database.
Search:	Click here to go to the Search page.
Browse:	Click here to list all the data available in the database.
Edit:	Click here to edit the current page.
Delete:	Click here to delete the current listing from the database.



DETAILED DESCRIPTION

None.

PAGE LINKS

None.

USER INPUTS

The following provides detail regarding the available input fields. After you make any necessary edits, click the SAVE button to save your changes.

Title:	Indicates Title for this listing.
My Response:	Indicates Response for this listing.

OTHER HELP PAGES RELATING TO THIS TOPIC

My Response Add Page

My Response Detail Listing

My Response List Page

My Response Search Page

User Manual & Documentation

PAGE TITLE

My Response List Page

SYNOPSIS

This page lists available quick responses.

HELP TOPIC

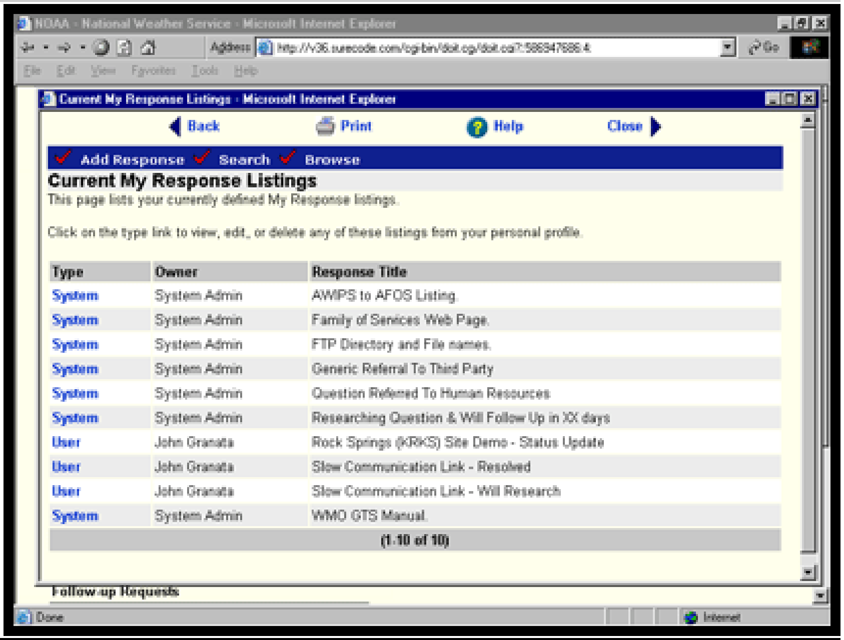
Quick Response

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Add Response:	Click here to Add a new data record into the database.
Search:	Click here to go to the Search page.
Browse:	Click here to list all the data available in the database.



DETAILED DESCRIPTION

Lists all of the responses at your disposal. Each can be accessed from the Service This Request page.

PAGE LINKS

Type:	Click here to View the full details of this listing.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

My Response Add Page

My Response Detail Listing

My Response Edit Page

My Response Search Page

User Manual & Documentation

PAGE TITLE

My Response Search Page

SYNOPSIS

Use this page to search the Quick Response database.

HELP TOPIC

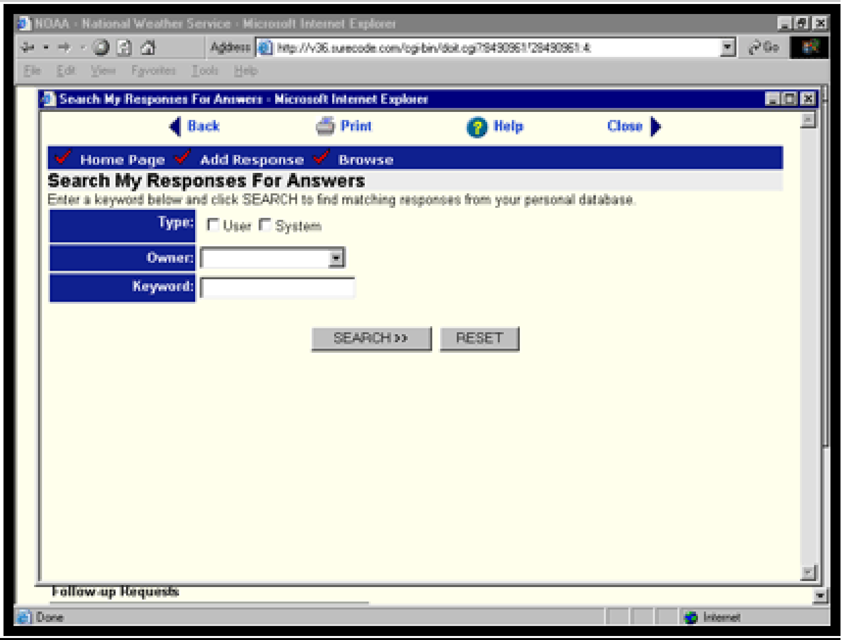
Quick Response

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Home Page:	Click here to your Home page.
Add Response:	Click here to add a new data record into the database.
Browse:	Click here to list all the data available in the database.



DETAILED DESCRIPTION

This page gives you flexibility in searching the Response database. You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your results will be. To list every listing in the Response database, just leave all the input fields blank and click the **SEARCH** button.

PAGE LINKS

None.

USER INPUTS

After selecting one or more criteria from the options listed below, click the **SEARCH** button to see those matching Responses.

Type:	Indicate Type you would like to search by.
Owner:	Indicate Owner you would like to search by.
Keyword:	Indicate Keyword(s) you would like to search by.

OTHER HELP PAGES RELATING TO THIS TOPIC

My Response Add Page
My Response Detail Listing
My Response Edit Page
My Response List Page

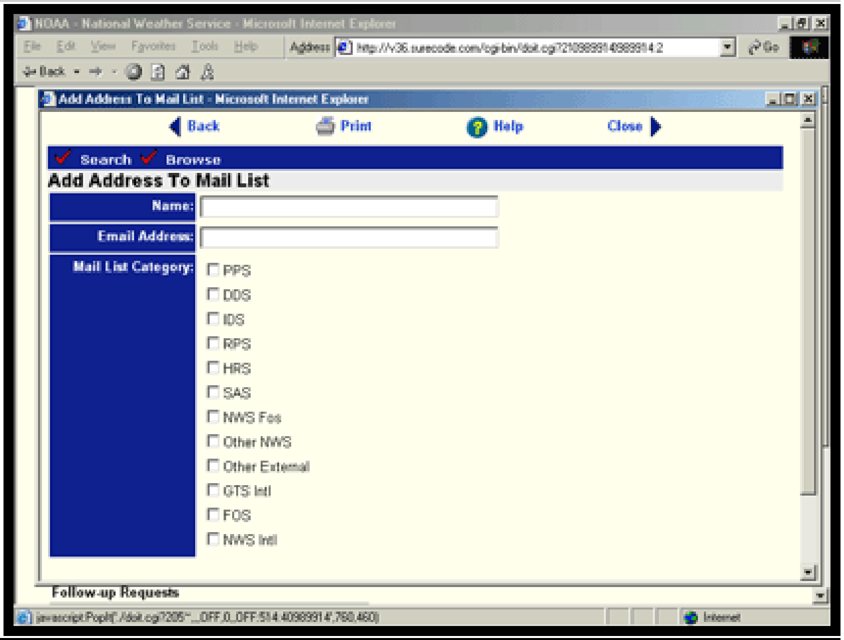
User Manual & Documentation

PAGE TITLE

Referral Lists Add Page

SYNOPSIS

Use this page to add a Referral Lists listing.



HELP TOPIC

Referral Lists

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list the entire contents of the database.

DETAILED DESCRIPTION

Service Representatives can add their own referral lists whenever necessary. Lists that are added by individual Service Representatives are only visible to that user. In other words, they are User types.

Any Referral Lists added by a Supervisor is stored as a System type message. These are available to all users.

PAGE LINKS

None.

USER INPUTS

Title:	Title of the message as it should appear on the quick selection drop-down list provided on the Referral page.
My Referral List:	List of email addresses of the individuals on this list. Each address should be separated by a comma and there should be no spaces included between addresses.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Lists Detail Page

Referral Lists Edit Page

Referral Lists List Page

User Manual & Documentation

PAGE TITLE

Referral Lists Detail Page

SYNOPSIS

Shows the detail for a record in the Referral Lists database.

HELP TOPIC

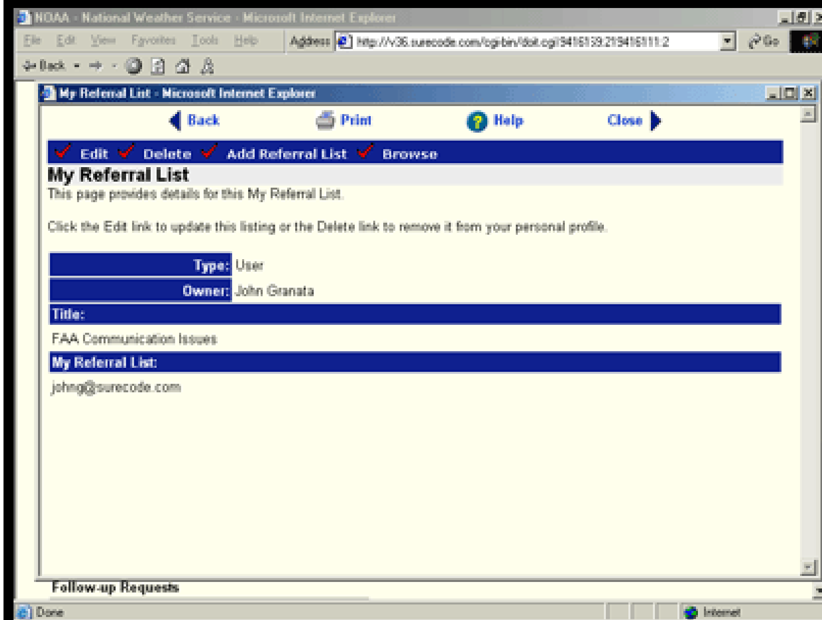
Referral Lists

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Edit:	Click here to edit the current page.
Delete:	Click here to delete the current listing from the database.
Add Referral List:	Click here to add a new data record into the database.
Browse:	Click here to list the entire contents of the database.



DETAILED DESCRIPTION

None.

PAGE LINKS

None.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Lists Add Page

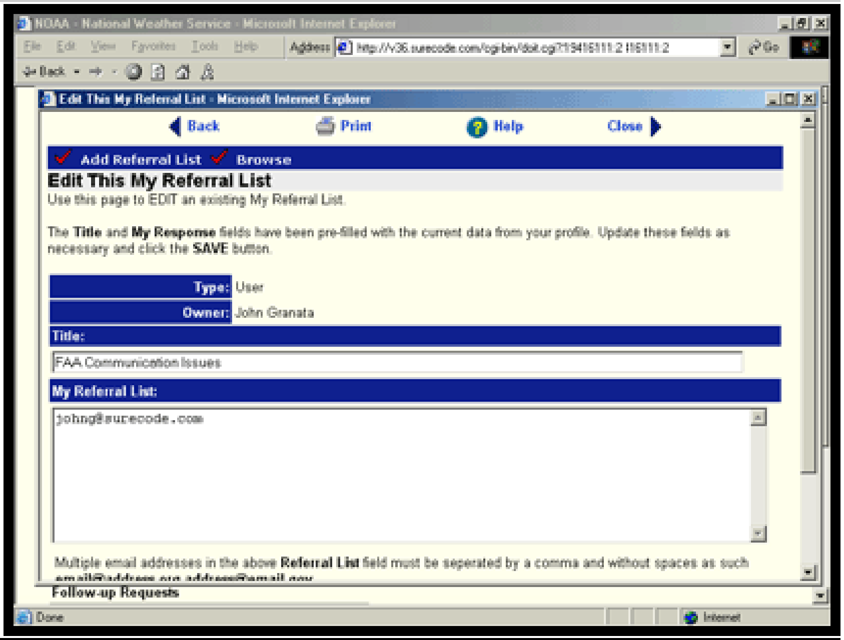
Referral Lists Edit Page

Referral Lists List Page

User Manual & Documentation

PAGE TITLE

Referral Lists Edit Page



SYNOPSIS

Use this page to edit a Referral List.

HELP TOPIC

Referral Lists

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Add Referral List:	Click here to add a new data record into the database.
Browse:	Click here to list the entire contents of the database.

DETAILED DESCRIPTION

Service Representatives can edit any of their own lists at any time. Supervisors can edit either System or User lists as necessary.

PAGE LINKS

None.

USER INPUTS

Title:	Title of the message as it should appear on the quick selection drop-down list provided on the Referral page.
Referral List:	Email addresses that define the current list. Each address must be separated by a comma and without any space between individual addresses.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Lists Add Page

Referral Lists Detail Page

Referral Lists List Page

User Manual & Documentation

PAGE TITLE

Referral Lists List Page

SYNOPSIS

Lists items from the Referral Lists database.

HELP TOPIC

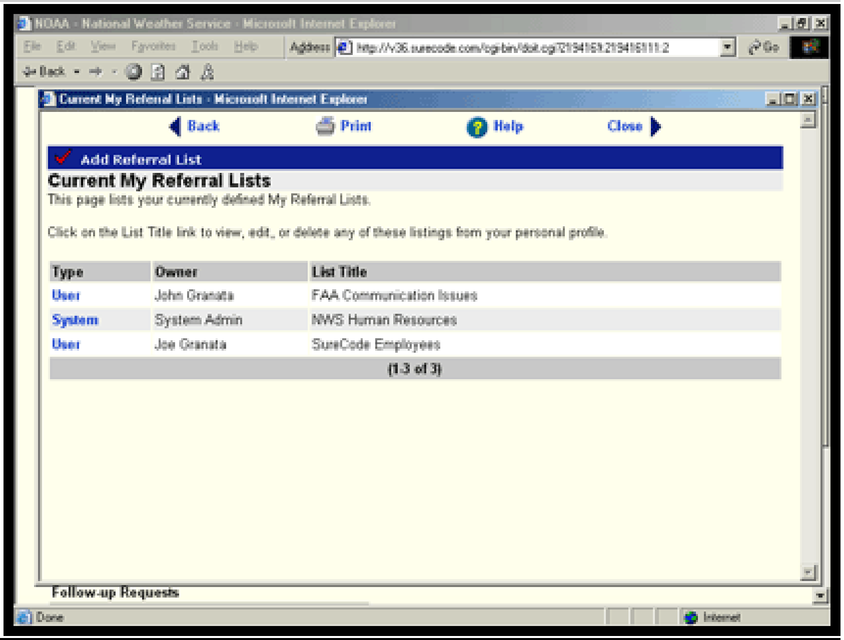
Referral Lists

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Add Referral List:	Click here to Add a new list into the database.



DETAILED DESCRIPTION

The Referral Lists List Page shows the entire contents of the Referral Lists database. This database is used to define and store email lists of frequency used subject-matter experts that may receive referrals.

The system supports two types of Referral Lists: (1) System and (2) User. System lists are available to all users, while User messages are only visible to the user who created the list. All Referral Lists created by a Supervisor are automatically stored as System types. Lists created by individual Service Representatives are defined to be the User type.

PAGE LINKS

Type:	Click here to open the Referral List detail page for the listed item.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Lists Add Page

Referral Lists Detail Page

Referral Lists Edit Page

User Manual & Documentation

PAGE TITLE

Referral Messages Add Page

SYNOPSIS

Use this page to add a Referral Message listing.

HELP TOPIC

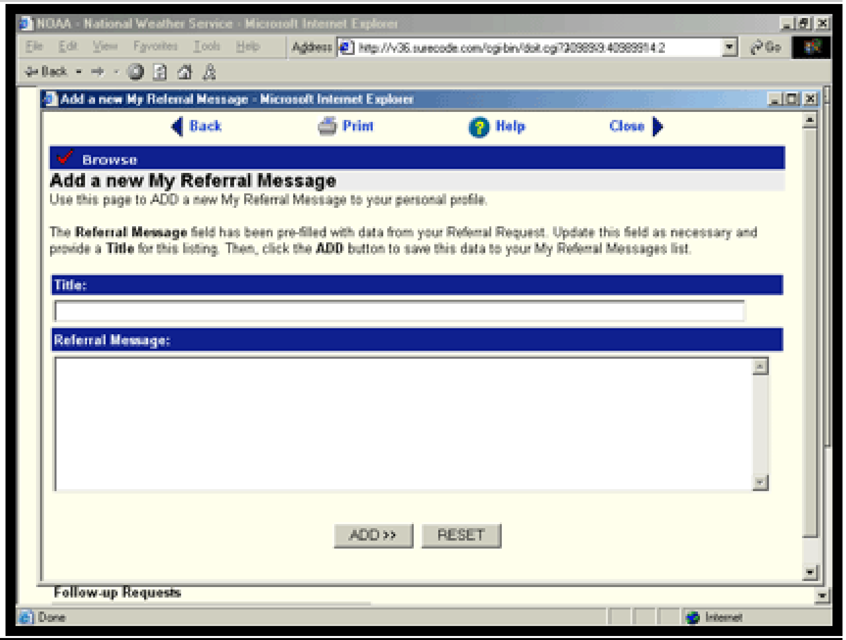
Referral Messages

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list the entire contents of the database.



DETAILED DESCRIPTION

Service Representatives can add their own referral messages whenever necessary. Messages that are added by individual Service Representatives are only visible to that user. Any Referral Message added by Supervisors are stored as System type messages and are available to all users.

PAGE LINKS

None.

USER INPUTS

Title:	Title of the message as it should appear on the quick selection drop-down list provided on the Referral page.
Referral Message:	The message as it should appear in the body of the email that is sent to the individual receiving the referral.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Messages Detail Page

Referral Messages Edit Page

Referral Messages List Page

User Manual & Documentation

PAGE TITLE

Referral Messages Detail Page

SYNOPSIS

Shows the detail for a record in the Referral Message database.

HELP TOPIC

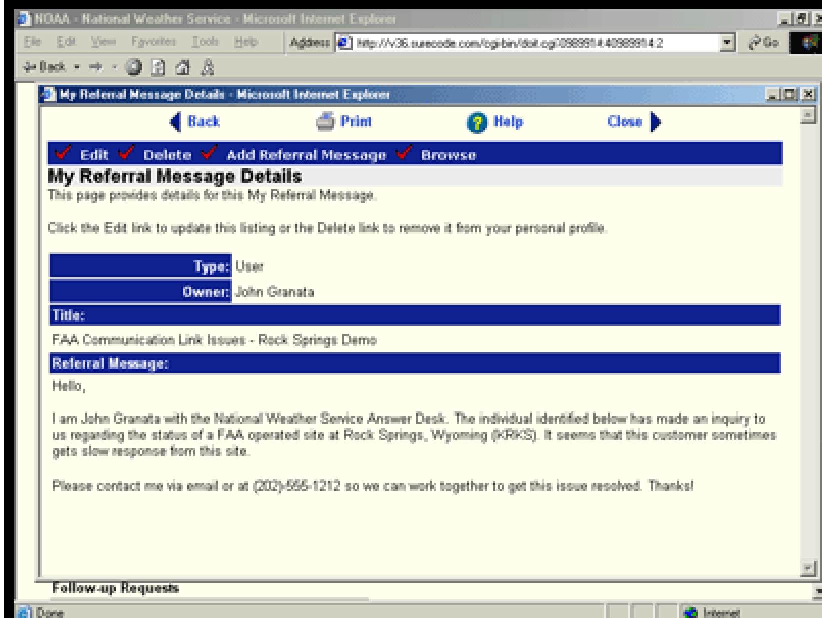
Referral Messages

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Edit:	Click here to edit the current page.
Delete:	Click here to delete the current listing from the database.
Add Referral Message:	Click here to Add a new data record into the database.
Browse:	Click here to list the entire contents of the database.



DETAILED DESCRIPTION

None.

PAGE LINKS

None.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Messages Add Page

Referral Messages Edit Page

Referral Messages List Page

User Manual & Documentation

PAGE TITLE

Referral Messages Edit Page

SYNOPSIS

Use this page to edit a Referral Message.

HELP TOPIC

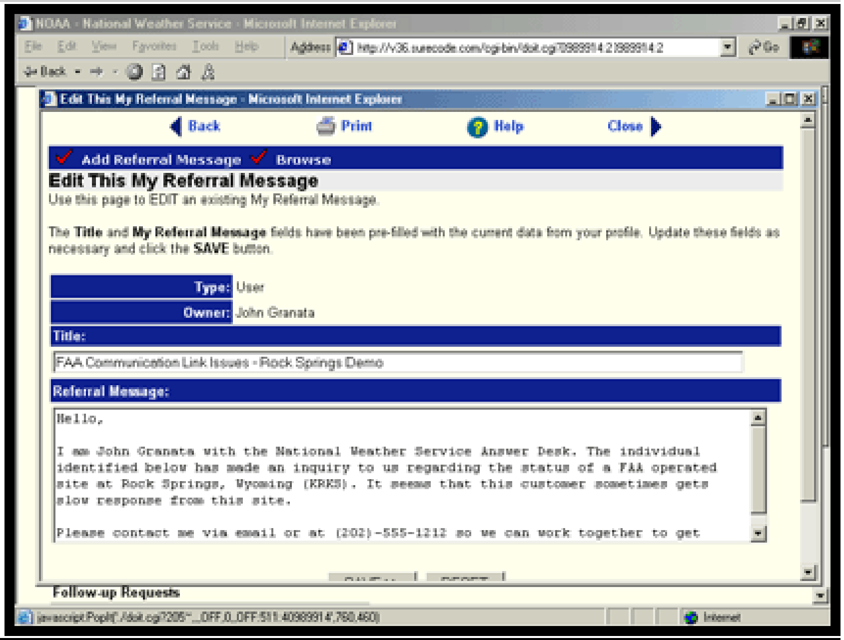
Referral Messages

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Add Referral Message:	Click here to Add a new data record into the database.
Browse:	Click here to list the entire contents of the database.



DETAILED DESCRIPTION

Service Representatives can edit any of their own messages at any time. Supervisors can edit any message - either System or those created by individual users.

PAGE LINKS

None.

USER INPUTS

Title:	Title of the message as it should appear on the quick selection drop-down list provided on the Referral page.
Referral Message:	The message as it should appear in the body of the email that is sent to the individual receiving the referral.

OTHER HELP PAGES RELATING TO THIS TOPIC

[Referral Messages Add Page](#)

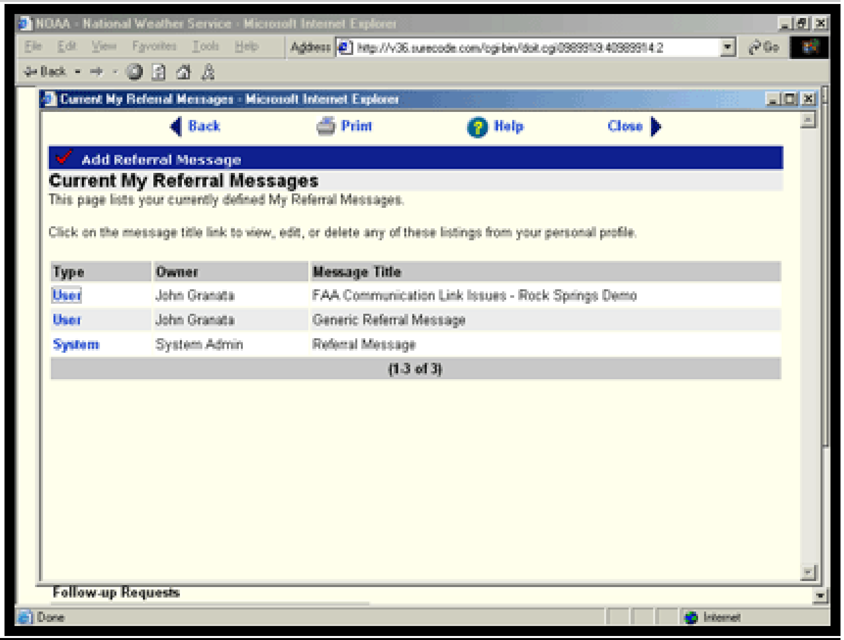
[Referral Messages Detail Page](#)

[Referral Messages List Page](#)

User Manual & Documentation

PAGE TITLE

Referral Messages List Page



SYNOPSIS

Lists items from the Referral Messages database.

HELP TOPIC

Referral Messages

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Add Referral Message :	Click here to add a new message into the database.

DETAILED DESCRIPTION

The Referral Messages List Page lists the entire contents of the Referral Messages database. This database is used to define and store frequently used and/or generic referral messages that are accessible to Service Representatives when making referrals.

The system supports two types of Referral Messages: (1) System and (2) User. System messages are available to all users. User messages are only visible to the individual Service Representative who created the message. All Referral Messages created by a Supervisor are automatically stored as the System type, while messages created by individual Service Representatives are stored as the User type.

PAGE LINKS

Type:	Click here to open the Referral Message detail page for the listed item.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Messages Add Page

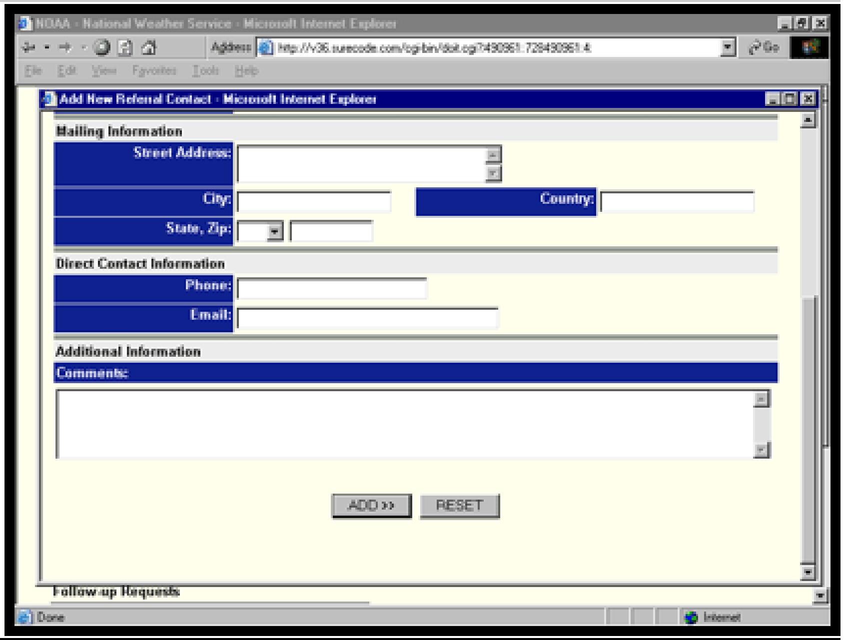
Referral Messages Detail Page

Referral Messages Edit Page

User Manual & Documentation

PAGE TITLE

Referral Contacts Add Page



SYNOPSIS

Add a referral contact.

HELP TOPIC

Referrals Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list the entire contents of the database.
Search:	Click here to open the Search page.
Add New Contact:	Click here to Add a new data record into the database.

DETAILED DESCRIPTION

Add a referral contact by providing as much information pertaining to the customer as available. All the data included on this page will be available from the Service This Request page as any service request from this customer is resolved.

PAGE LINKS

None

USER INPUTS

The following provides detail regarding the available input fields. After you make any necessary edits, click the ADD button to save your changes.

Point of Contact:	Provide the name of the point of contact.
Title:	Indicate their title.
Expertise:	Indicate their area of expertise.
Affiliation:	Provide their affiliation.
Street Address:	Provide their street address.
City:	Provide their city.
State:	Provide their state.
Zip:	Provide their zip.
Country:	Provide their country.
Phone:	Provide their phone number.
Email:	Provide their email address.
Comments:	Provide some comments regarding this individual.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Contacts Detail Page

Referral Contacts Edit Page

Referral Contacts List Page

Referral Contacts Search Page

User Manual & Documentation

PAGE TITLE

Referral Contacts Detail Page

SYNOPSIS

Detailed information regarding a referral contact.

HELP TOPIC

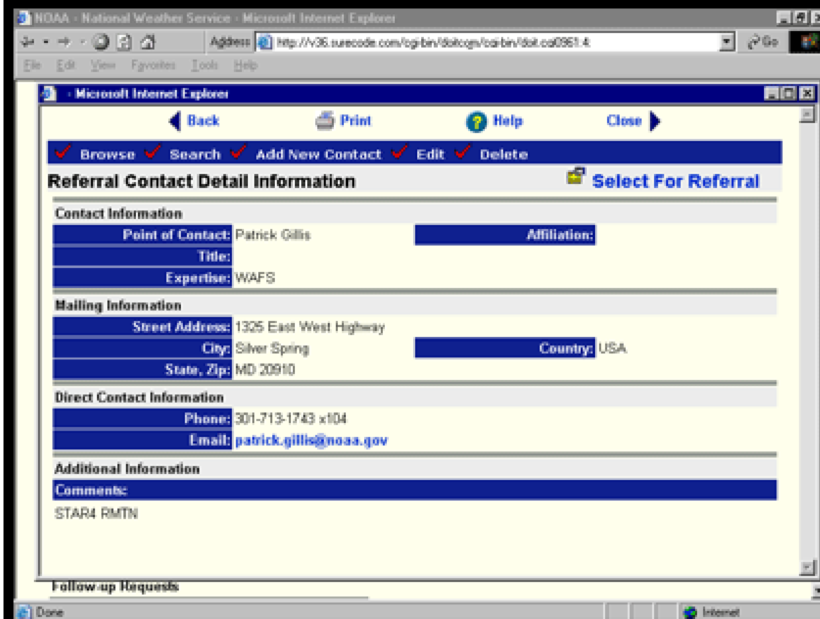
Referrals Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list the entire contents of the database.
Search:	Click here to open the Search page.
Add New Contact:	Click here to add a new data record into the database.
Edit:	Click here to edit the current listing.
Delete:	Click here to delete the current listing.



DETAILED DESCRIPTION

None.

PAGE LINKS

Select For Referral:	Clicking this link while the Make Referral page is open appends the email address listed on the Referral Detail page to the Referral List field. This feature helps to reduce unnecessary retyping of information.
Email:	This link opens your local mail client with the indicated address loaded into the **To:** field.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Contacts Add Page

Referral Contacts Edit Page

Referral Contacts List Page

Referral Contacts Search Page

User Manual & Documentation

PAGE TITLE

Referral Contacts Edit Page

SYNOPSIS

Used to modify referral contact information.

HELP TOPIC

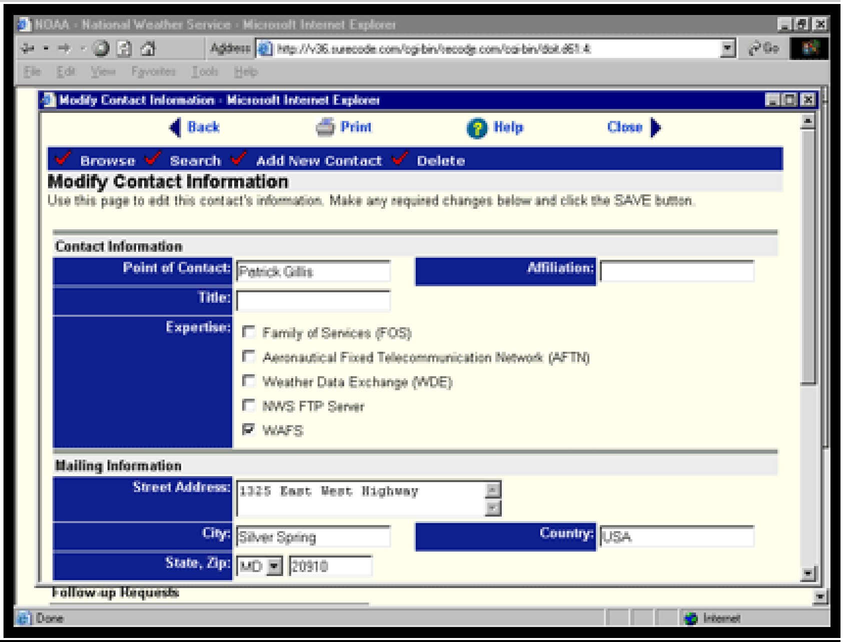
Referrals Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list the entire contents of the database.
Search:	Click here to open the Search page.
Add New Contact:	Click here to add a new data record into the database.
Delete:	Click here to delete the current listing.



DETAILED DESCRIPTION

Modify any of the information associated with a referral contact.

PAGE LINKS

None

USER INPUTS

The following provides detail regarding the available input fields. After you make any necessary edits, click the **Save** button to save your changes.

Point of Contact:	Provide the name of the point of contact.
Title:	Indicate their title.
Expertise:	Indicate their area of expertise.
Affiliation:	Provide their affiliation.
Street Address:	Provide their street address.
City:	Provide their city.
State:	Provide their state.
Zip:	Provide their zip.
Country:	Provide their country.
Phone:	Provide their phone number.
Email:	Provide their email address.
Comments:	Provide some comments regarding this individual.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Contacts Add Page

Referral Contacts Detail Page

Referral Contacts List Page

Referral Contacts Search Page

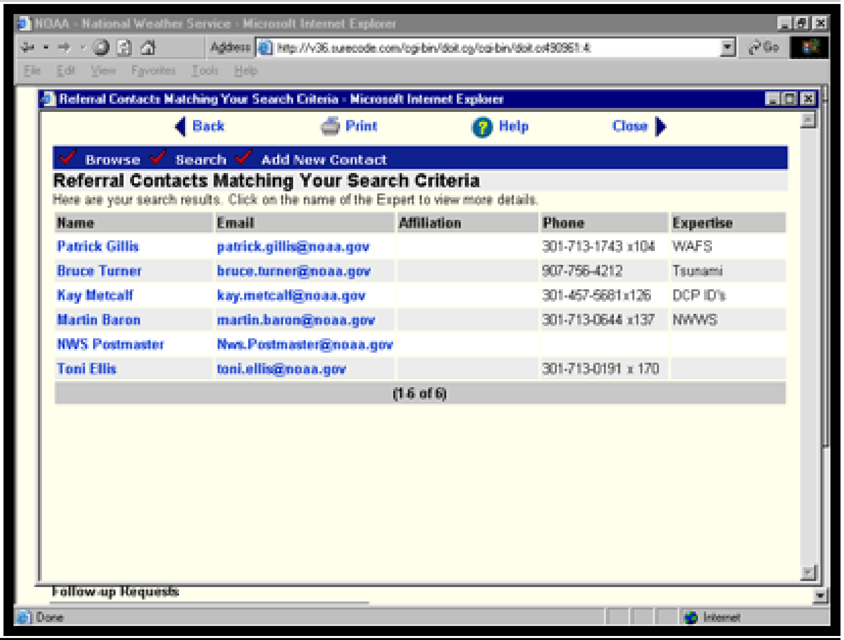
User Manual & Documentation

PAGE TITLE

Referral Contacts List Page

SYNOPSIS

List of referral contacts that match a search or browse.



HELP TOPIC

Referrals Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list the entire contents of the database.
Search:	Click here to open the Search page.
Add New Contact:	Click here to add a new data record into the database.

DETAILED DESCRIPTION

Lists matching referral contacts after a search or browse of the database. When shown after a search, only those contacts matching any entered search criteria are listed. When shown after a browse, all referral contacts are listed.

PAGE LINKS

Name:	Click here to view the full detail for the listed item.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Contacts Add Page

Referral Contacts Detail Page

Referral Contacts Edit Page

Referral Contacts Search Page

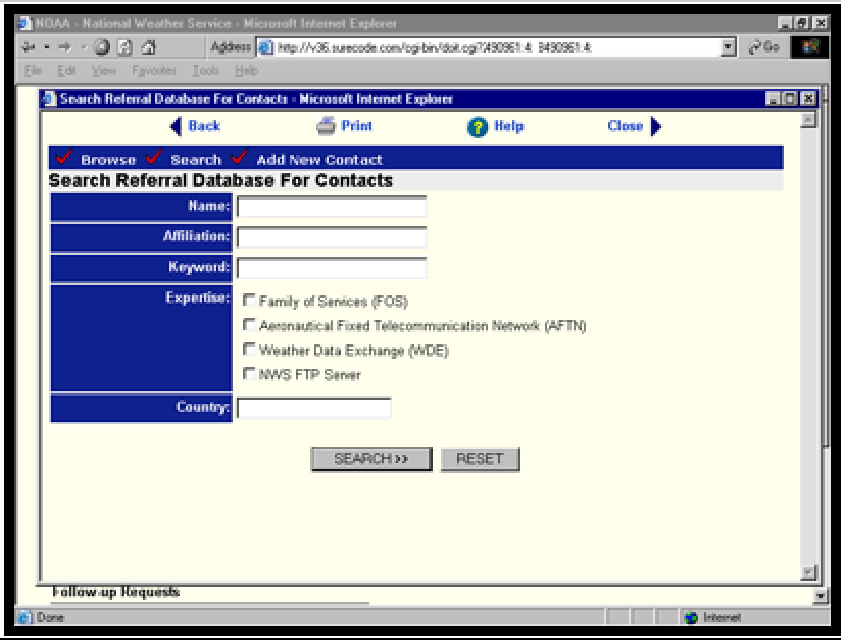
User Manual & Documentation

PAGE TITLE

Referral Contacts Search Page

SYNOPSIS

Used to search the referral contacts database.



HELP TOPIC

Referrals Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Browse:	Click here to list the entire contents of the database.
Search:	Click here to open the Search page.
Add New Contact:	Click here to add a new data record into the database.

DETAILED DESCRIPTION

Search the referral contacts by any combination of name, affiliation, keyword, expertise and country. This page gives you a lot of flexibility when searching. You can choose any combination of the provided selection criteria. The more you select, the more focused your results will be. To list every listing in the Referrals database, just leave all the input fields blank and click the **SEARCH** button.

PAGE LINKS

None

USER INPUTS

After selecting one or more criteria from the options listed below, click the **SEARCH** button to list any matching referral contacts.

Name:	Search for referrals with the provided name.
Affiliation:	Search for referrals with the provided affiliation.
Keyword:	Search based on the following keywords. Multiple words are combined using a logical *AND*. Keywords are matched against all available information fields.
Expertise:	Search for referrals with the provided expertise.
Country:	Search for referrals with the provided country.

OTHER HELP PAGES RELATING TO THIS TOPIC

Referral Contacts Add Page

Referral Contacts Detail Page

Referral Contacts Edit Page

Referral Contacts List Page

User Manual & Documentation

PAGE TITLE

Customer Satisfaction For The Last 30 Days

SYNOPSIS

Customer feedback snapshot for the last 30 days presented in a graphical format.

HELP TOPIC

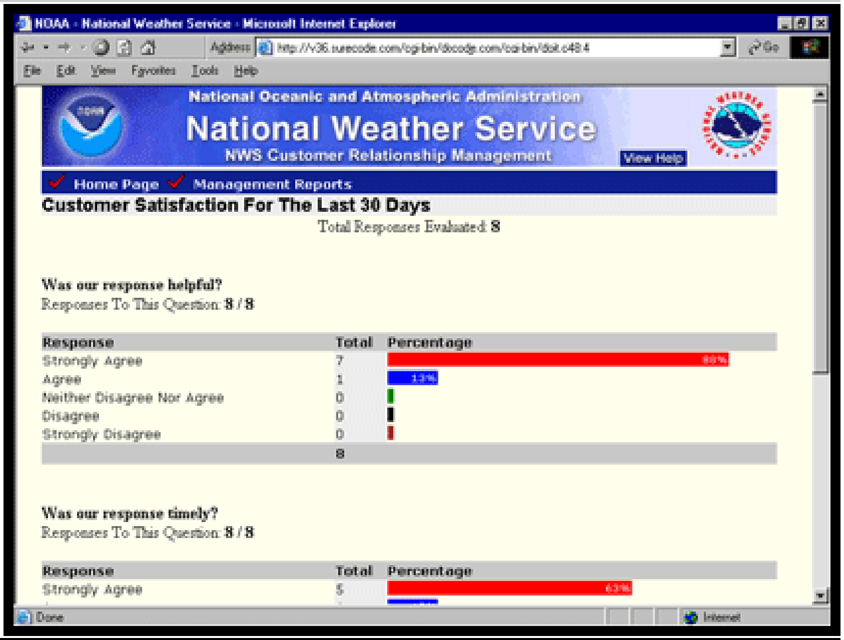
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.



DETAILED DESCRIPTION

None.

PAGE LINKS

None.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

- Customers Grouped By Affiliation
- Customers Grouped By Type
- Customers Sorted By Affiliation
- Department Activity Report
- Department Pipeline Report
- Department Response Time Report
- Feedback Comments By Date
- Feedback Grouped By Response Helpful
- Feedback Grouped By Response Timely
- Feedback Grouped By Site Easy
- Feedback Summary Report
- Filter Results By Date
- Service Representative Productivity Report
- Supervisor Management Reports
- System Wide Activity Report
- System Wide Feedback Detail Report
- System Wide Feedback Summary Report
- System Wide Pipeline Report
- System Wide Response Time Report

[Tickets Grouped By Category]
[Tickets Grouped By Service Representative]
[Tickets Grouped By Source]
[Tickets Grouped By Status]
[Tickets Sorted By Date]

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User Manual & Documentation

PAGE TITLE

Customers Grouped By Affiliation

SYNOPSIS

Lists all customers in the Customer database sorted and grouped by affiliation.

HELP TOPIC

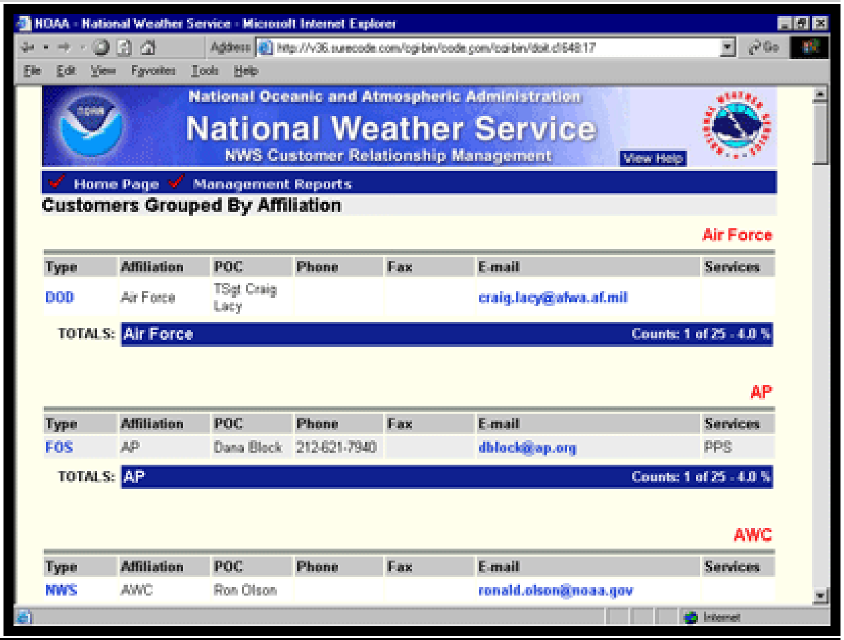
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.



DETAILED DESCRIPTION

This report provides subtotals and percentage-of-total for each group of customer affiliation.

PAGE LINKS

Type:	Links to the detail record for the given customer.
E-mail:	This link opens your local mail client with the indicated address loaded into the **To:** field.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

[Customer Satisfaction For The Last 30 Days](#)

[Customers Grouped By Type](#)

[Customers Sorted By Affiliation](#)

[Department Activity Report](#)

[Department Pipeline Report](#)

[Department Response Time Report](#)

[Feedback Comments By Date](#)

[Feedback Grouped By Response Helpful](#)

[Feedback Grouped By Response Timely](#)

[Feedback Grouped By Site Easy](#)

[Feedback Summary Report](#)

[Filter Results By Date](#)

[Service Representative Productivity Report](#)

[Supervisor Management Reports](#)

[System Wide Activity Report](#)

53

User Manual & Documentation

PAGE TITLE

Customers Grouped By Type

SYNOPSIS

Lists all customers in the Customer database sorted and grouped by type.

HELP TOPIC

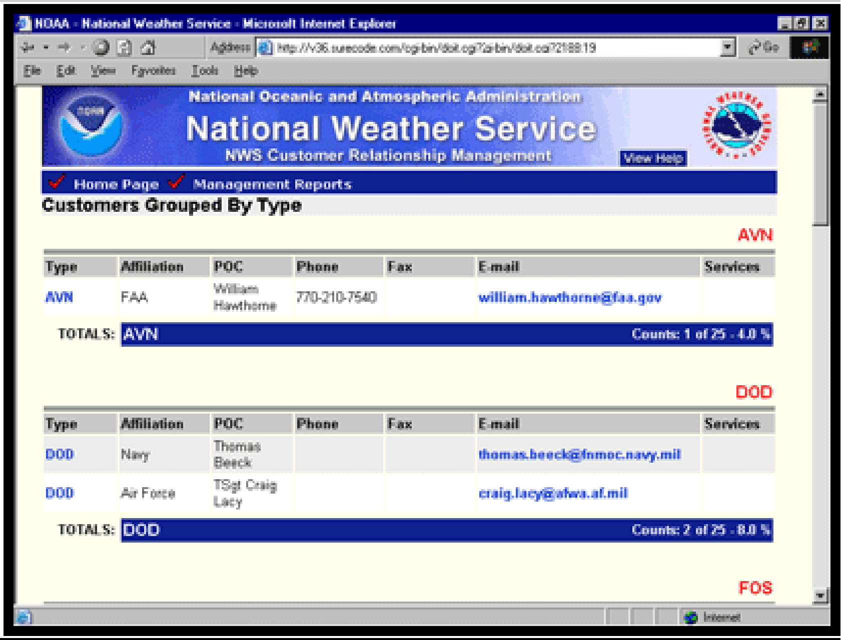
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.



DETAILED DESCRIPTION

This report provides subtotals and percentage-of-total for each group of customer type.

PAGE LINKS

Type:	Links to the detail record for the listed customer.
E-mail:	This link opens your local mail client with the indicated address loaded into the **To:** field.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days

Customers Grouped By Affiliation

Customers Sorted By Affiliation

Department Activity Report

Department Pipeline Report

Department Response Time Report

Feedback Comments By Date

Feedback Grouped By Response Helpful

Feedback Grouped By Response Timely

Feedback Grouped By Site Easy

Feedback Summary Report

Filter Results By Date

Service Representative Productivity Report

Supervisor Management Reports

System Wide Activity Report

User Manual & Documentation

PAGE TITLE

Customers Sorted By Affiliation

SYNOPSIS

Lists all customers in the Customer database sorted by affiliation.

HELP TOPIC

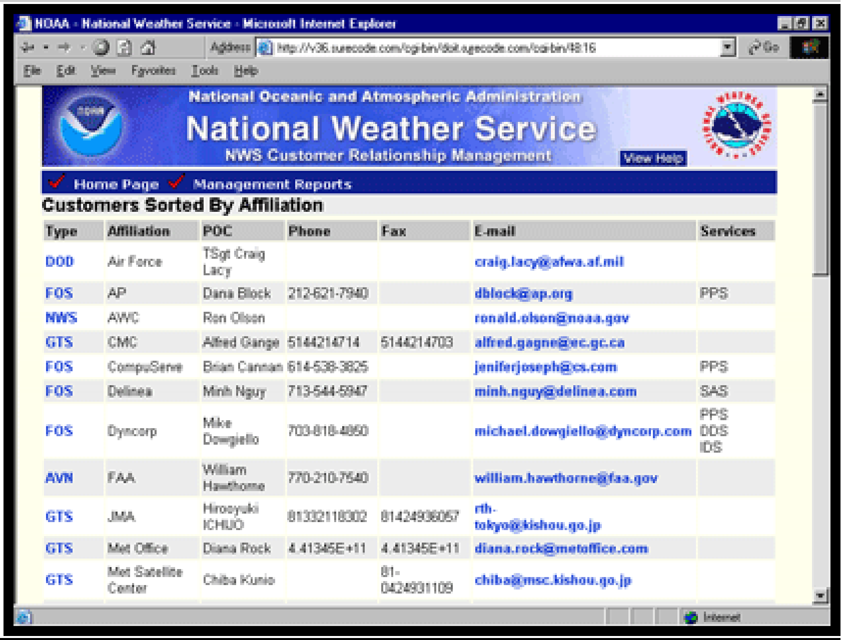
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to Supervisor Home page.
Management Reports:	Links to Supervisor Reports page.



DETAILED DESCRIPTION

None.

PAGE LINKS

Type:	Links to the Customer Detail page for the listed customer.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

[Customer Satisfaction For The Last 30 Days](#)

[Customers Grouped By Affiliation](#)

[Customers Grouped By Type](#)

[Department Activity Report](#)

[Department Pipeline Report](#)

[Department Response Time Report](#)

[Feedback Comments By Date](#)

[Feedback Grouped By Response Helpful](#)

[Feedback Grouped By Response Timely](#)

[Feedback Grouped By Site Easy](#)

[Feedback Summary Report](#)

[Filter Results By Date](#)

[Service Representative Productivity Report](#)

[Supervisor Management Reports](#)

[System Wide Activity Report](#)

[System Wide Feedback Detail Report](#)

[System Wide Feedback Summary Report](#)

[System Wide Pipeline Report](#)

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User Manual & Documentation

PAGE TITLE

Department Activity Report

SYNOPSIS

This report summarizes department activity for a given date range.

HELP TOPIC

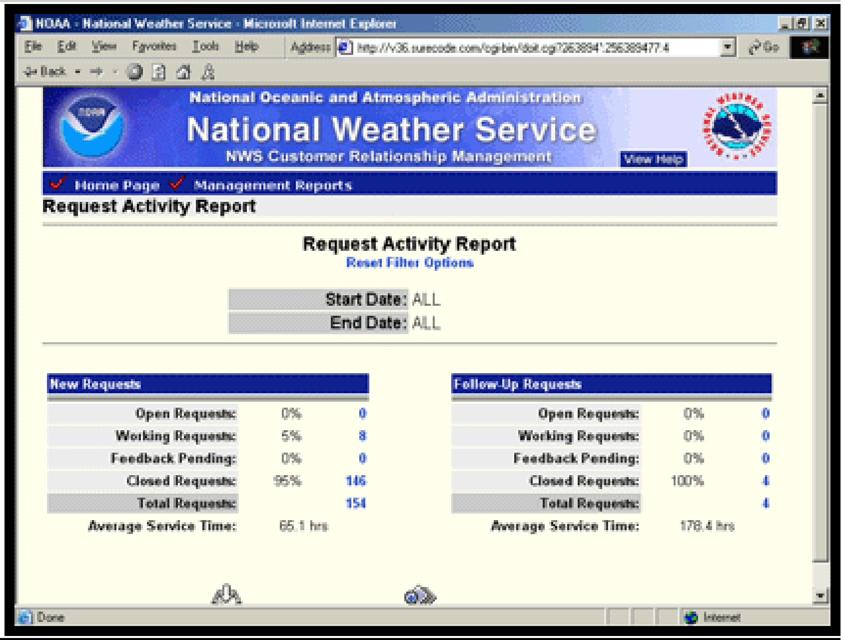
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports :	Links to the Supervisor Reports page.



DETAILED DESCRIPTION

A service request is included on this report if there has been any change in its status within the selected date range.

When tabulating results for this report, the system discerns between **New Requests** and **Follow-Up Requests**.

A New Request is logged every time a customer or Service Representative opens a new request for service. A Follow-Up Request results when a Service Representative responds to a customer, closes their request, and the customer proceeds to reply with an additional related issue.

If the number of follow-up requests is *low* in relation to the number of new, that is an indication that issues are being resolved thoroughly the first time. If not, this may indicate the need for further investigation.

The data for New Requests is shown on the left side of the page. Data for Follow-Up Requests is presented on the right side.

The following table provides additional clarification regarding the meaning of the various data points collected.

Open Requests:	A customer request that has not yet received any service.
Working Requests:	A customer request that is assigned to a particular Service Representative and has received some initial service - but remains unresolved.
Feedback Pending:	These indicate requests where a Service Representative has requested additional clarification from the customer and is waiting for feedback.
Closed Requests:	Requests that have been serviced and closed.
Total Requests:	The total of open, working, pending, and closed requests for the selected date range.
Average Service Time:	This number is based on closed requests in the selected date range. It reports the average number of hours necessary to close a customer request.

PAGE LINKS

In addition to the link described below, this report provides *drill-down* support for all of the data tabulated. To see a detailed listing of the individual Request Tickets included in any of the reported results, just click on the number of interest.

Reset Filter Options:	Click here to reset the results filter.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

User Manual & Documentation

PAGE TITLE

Department Pipeline Report

SYNOPSIS

This report summarizes the department pipeline status for a given date range.

HELP TOPIC

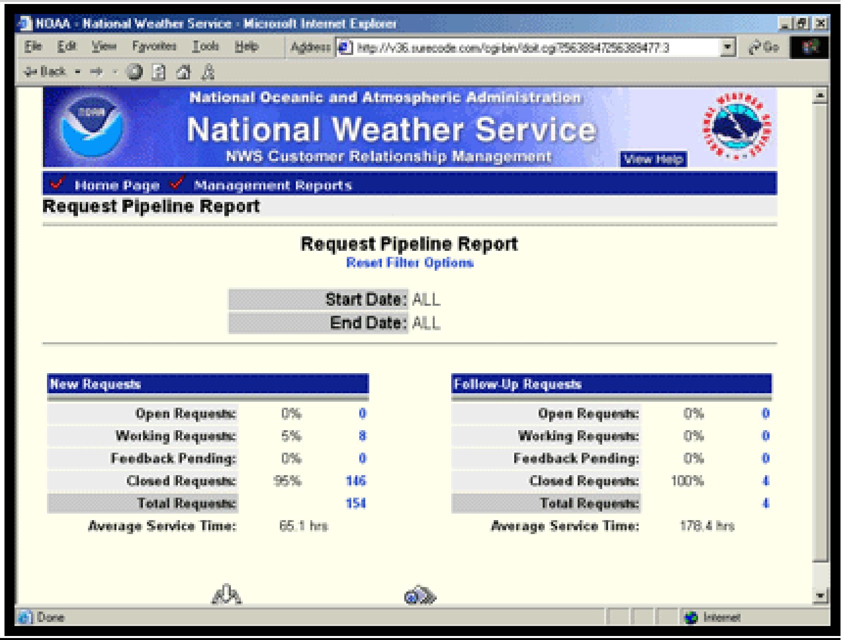
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports :	Links to the Supervisor Reports page.



DETAILED DESCRIPTION

A service request is included on this report if it was originated within the selected date range irrespective of any change in its status.

When tabulating results for this report, the system discerns between **New Requests** and **Follow-Up Requests**.

A New Request is logged every time a customer or Service Representative opens a new request for service. A Follow-Up Request results when a Service Representative responds to a customer, closes their request, and the customer proceeds to reply with an additional related issue.

If the number of follow-up requests is *low* in relation to the number of new, that is an indication that issues are being resolved thoroughly the first time. If not, this may indicate the need for further investigation.

The data for New Requests is shown on the left side of the page. Data for Follow-Up Requests is presented on the right side.

The following table provides additional clarification regarding the meaning of the various data points collected.

Open Requests:	A customer request that has not yet received any service.
Working Requests:	A customer request that is assigned to a particular Service Representative and has received some initial service - but remains unresolved.
Feedback Pending:	These indicate requests where a Service Representative has requested additional clarification from the customer and is waiting for feedback.
Closed Requests:	Requests that have been serviced and closed.
Total Requests:	The total of open, working, pending, and closed requests for the selected date range.
Average Service Time:	This number is based on closed requests in the selected date range. It reports the average number of hours necessary to close a customer request.

PAGE LINKS	USER INPUTS
In addition to the link described below, this report provides *drill-down* support for all of the data tabulated. To see a detailed listing of the individual Request Tickets included in any of the reported results, just click on the number of interest.	None.

Reset Filter Options:	Click here to reset the date filter for this report.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Response Time Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Service Representative Productivity Report
Supervisor Management Reports
System Wide Activity Report
System Wide Feedback Detail Report
System Wide Feedback Summary Report
System Wide Pipeline Report
System Wide Response Time Report
Tickets Grouped By Category
Tickets Grouped By Service Representative
Tickets Grouped By Source
Tickets Grouped By Status
Tickets Sorted By Date

User Manual & Documentation

PAGE TITLE

Department Response Time Report

SYNOPSIS

This report provides a breakdown of response time for requests serviced in a selected date range.

HELP TOPIC

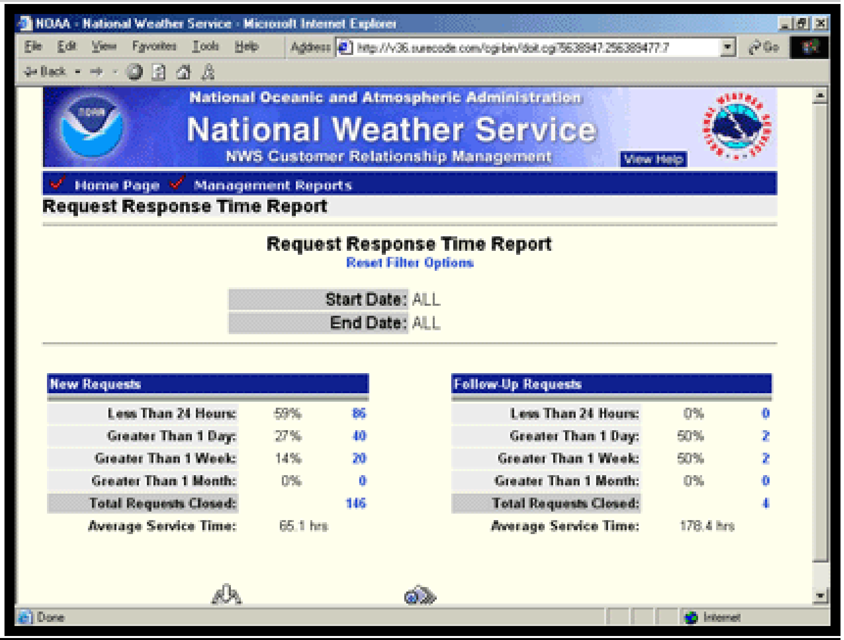
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.



DETAILED DESCRIPTION

A service request is included on this report if it was closed within the selected date range.

When tabulating results for this report, the system discerns between **New Requests** and **Follow-Up Requests**.

A New Request is logged every time a customer or Service Representative opens a new request for service. A Follow-Up Request results when a Service Representative responds to a customer, closes their request, and the customer proceeds to reply with an additional related issue.

If the number of follow-up requests is *low* in relation to the number of new, that is an indication that issues are being resolved thoroughly the first time. If not, this may indicate the need for further investigation.

The data for New Requests is shown on the left side of the page. Data for Follow-Up Requests is presented on the right side.

The following table provides additional clarification regarding the meaning of the various data points collected.

Less Than 24 Hours:	Requests closed within 24 hours of the original customer contact. This includes those requests that were closed directly by the customer using the integrated FAQ database.
Greater Than 1 Day:	Includes all requests that required less than a 1 week but more than 1 day to resolve.
Greater Than 1 Week:	Includes all requests that required less than a 1 month but more than 1 week to resolve.
Greater Than 1 Month:	Includes all requests that required 1 month or more time to resolve.
Total Requests:	The total number of requests closed within the selected date range.
Average Service Time:	Reports the average number of hours necessary to close a customer request during the selected date range.

PAGE LINKS	USER INPUTS
In addition to the link described below, this report provides *drill-down* support for all of the data tabulated. To see a detailed listing of the individual Request Tickets included in any of the reported results, just click on the number of interest.	None.

Reset Filter Options:	Click here to return to the Date Selection page to filter results using a new date range.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Service Representative Productivity Report
Supervisor Management Reports
System Wide Activity Report
System Wide Feedback Detail Report
System Wide Feedback Summary Report
System Wide Pipeline Report
System Wide Response Time Report
Tickets Grouped By Category
Tickets Grouped By Service Representative
Tickets Grouped By Source
Tickets Grouped By Status
Tickets Sorted By Date

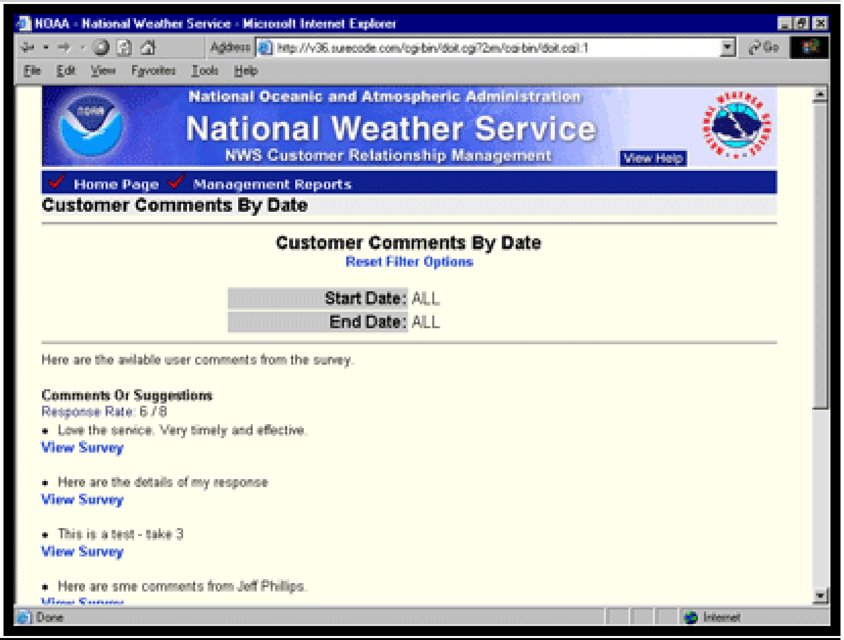
User Manual & Documentation

PAGE TITLE

Feedback Comments By Date

SYNOPSIS

This report lists customer comments and feedback from Surveys created within the selected date range.



HELP TOPIC

Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.

DETAILED DESCRIPTION

None.

PAGE LINKS

Reset Filter Options:	Click here to reset the date range options for this report.
View Survey:	Click here to view the entire survey of the individual who made the shown comments.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Department Response Time Report
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Service Representative Productivity Report
Supervisor Management Reports
System Wide Activity Report
System Wide Feedback Detail Report

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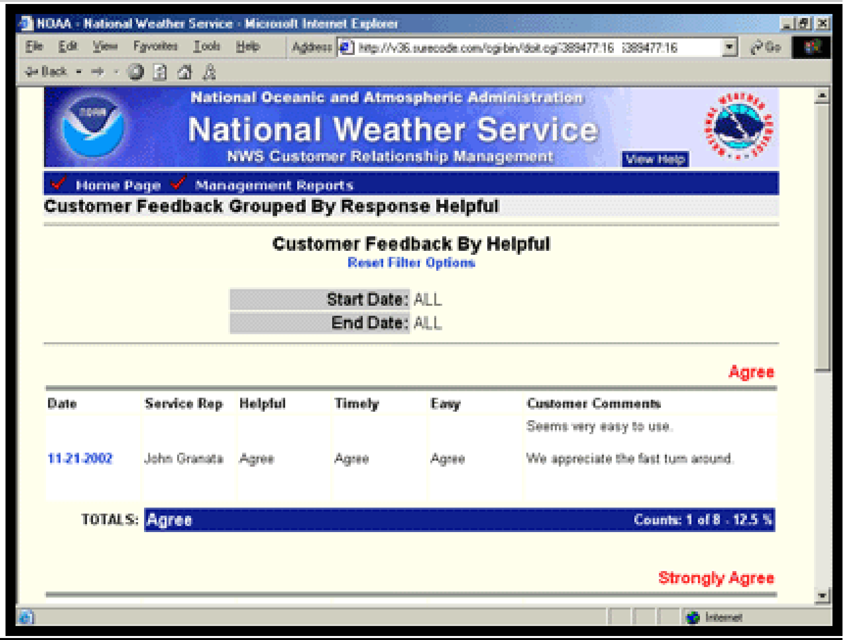
User Manual & Documentation

PAGE TITLE

Feedback Grouped By Response Helpful

SYNOPSIS

Customer feedback grouped based on responses to the *Response Helpful* question. This report supports date selection.



HELP TOPIC

Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.

DETAILED DESCRIPTION

None

PAGE LINKS

Reset Filter Options:	Click here to reset the filter options for this report.
Date:	Click here to view the detail page for this survey.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

- Customer Satisfaction For The Last 30 Days
- Customers Grouped By Affiliation
- Customers Grouped By Type
- Customers Sorted By Affiliation
- Department Activity Report
- Department Pipeline Report
- Department Response Time Report
- Feedback Comments By Date
- Feedback Grouped By Response Timely
- Feedback Grouped By Site Easy
- Feedback Summary Report
- Filter Results By Date
- Service Representative Productivity Report
- Supervisor Management Reports
- System Wide Activity Report
- System Wide Feedback Detail Report

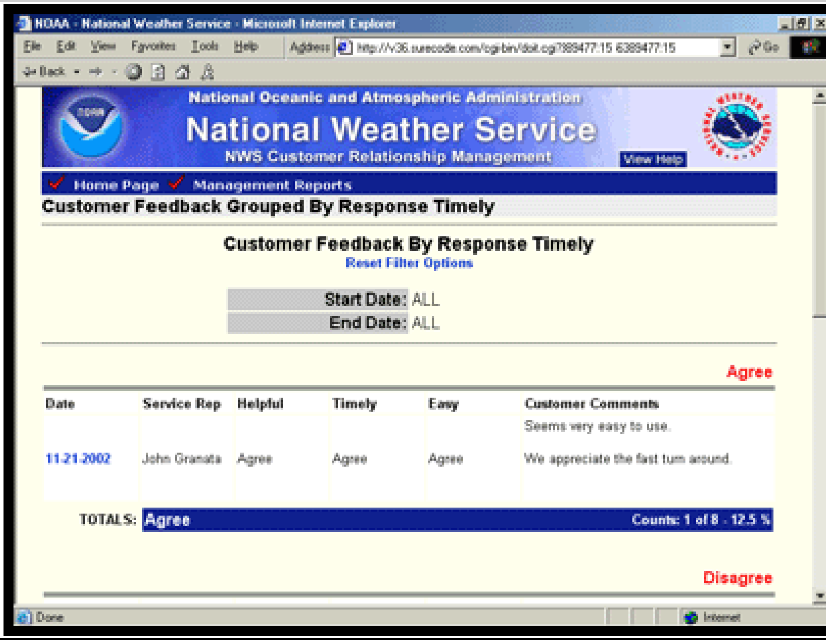
User Manual & Documentation

PAGE TITLE

Feedback Grouped By Response Timely

SYNOPSIS

Customer feedback grouped based on responses to the *Response Timely* question. This report supports date selection.



HELP TOPIC

Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.

DETAILED DESCRIPTION

None.

PAGE LINKS

Reset Filter Options:	Click here to reset the filter options for this report.
Date:	Click here to view the complete survey for the listed item.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days

Customers Grouped By Affiliation

Customers Grouped By Type

Customers Sorted By Affiliation

Department Activity Report

Department Pipeline Report

Department Response Time Report

Feedback Comments By Date

Feedback Grouped By Response Helpful

Feedback Grouped By Site Easy

Feedback Summary Report

Filter Results By Date

Service Representative Productivity Report

Supervisor Management Reports

System Wide Activity Report

System Wide Feedback Detail Report

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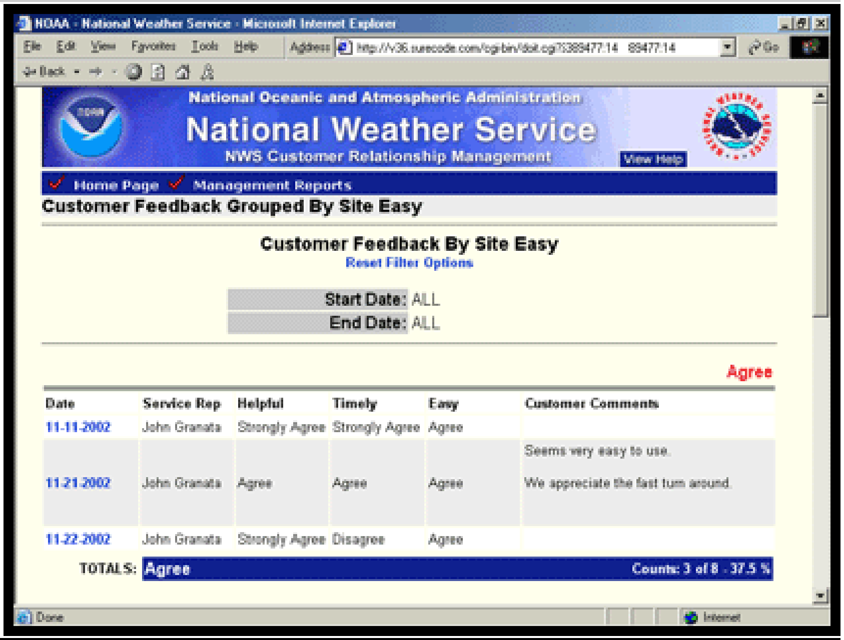
User Manual & Documentation

PAGE TITLE

Feedback Grouped By Site Easy

SYNOPSIS

Customer feedback grouped based on responses to the *Site Easy* question. This report supports date selection.



HELP TOPIC

Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.

DETAILED DESCRIPTION

None

PAGE LINKS

Reset Filter Options:	Click here to reset the filter options for this report.
Date:	Click here to view the complete customer survey for the item listed.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days

Customers Grouped By Affiliation

Customers Grouped By Type

Customers Sorted By Affiliation

Department Activity Report

Department Pipeline Report

Department Response Time Report

Feedback Comments By Date

Feedback Grouped By Response Helpful

Feedback Grouped By Response Timely

Feedback Summary Report

Filter Results By Date

Service Representative Productivity Report

Supervisor Management Reports

System Wide Activity Report

System Wide Feedback Detail Report

42

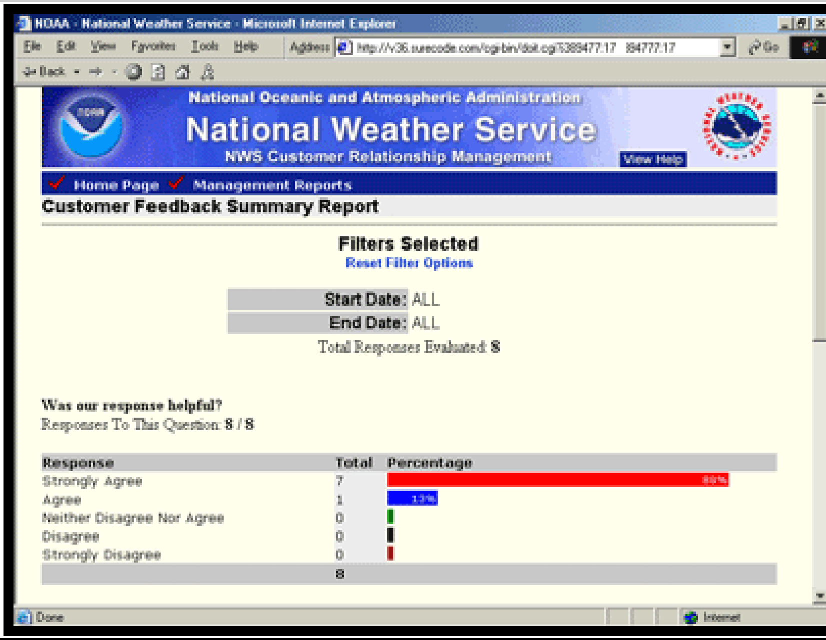
User Manual & Documentation

PAGE TITLE

Feedback Summary Report

SYNOPSIS

This report provides a graphical summary of customer feedback received in a given date range.



HELP TOPIC

Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.

DETAILED DESCRIPTION

None.

PAGE LINKS

Reset Filter Options:	Click here to reset the filter options for this report.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days

Customers Grouped By Affiliation

Customers Grouped By Type

Customers Sorted By Affiliation

Department Activity Report

Department Pipeline Report

Department Response Time Report

Feedback Comments By Date

Feedback Grouped By Response Helpful

Feedback Grouped By Response Timely

Feedback Grouped By Site Easy

Filter Results By Date

Service Representative Productivity Report

Supervisor Management Reports

System Wide Activity Report

System Wide Feedback Detail Report

System Wide Feedback Summary Report

System Wide Pipeline Report

40

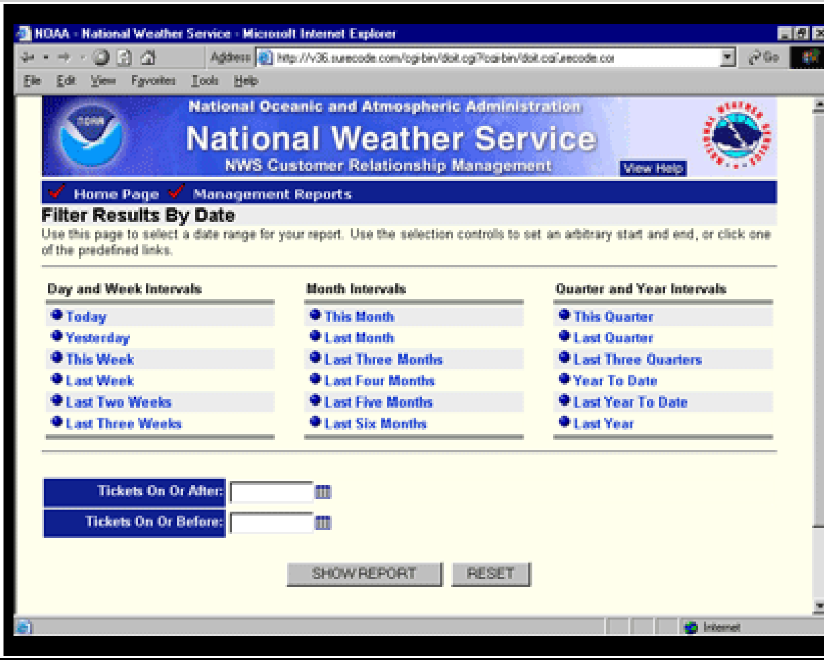
User Manual & Documentation

PAGE TITLE

Filter Results By Date

SYNOPSIS

Use this page to establish a date range filter for the selected report.



HELP TOPIC

Reports

USER CLASS

Supervisor
Executive Reports

MENU SELECTIONS

NOTE: Depending on your user class, not all menu selections are available from every page.

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Reports Home page.
Logout:	Logs the current user out and closes their session.

DETAILED DESCRIPTION

This page provides three ways to specify a date range.

(1) You can use one of the preset intervals by clicking on one of the many page links provided. This will set the date range based on the current date and your selection. This is often the quickest and easiest method to use.

(2) If the date range you need is not available from one of the preset links, you can click on the icon provided next to the *After* and *Before* input boxes to open a calendar window. The calendar provides the ability to select an arbitrary date.

(3) The third combines the two approaches. First select a preset date range as described in option (1), and then use the popup calendar as described in option (2) to refine your selection.

PAGE LINKS

This page provides various links that can be used to quickly set the date range. These are grouped into three categories: daily, monthly, and yearly. The date range specified in each case is indicated by the link prompt.

USER INPUTS

The following provides detail regarding the available input fields. After you make your selections, click the SHOW REPORT button to generate your report.

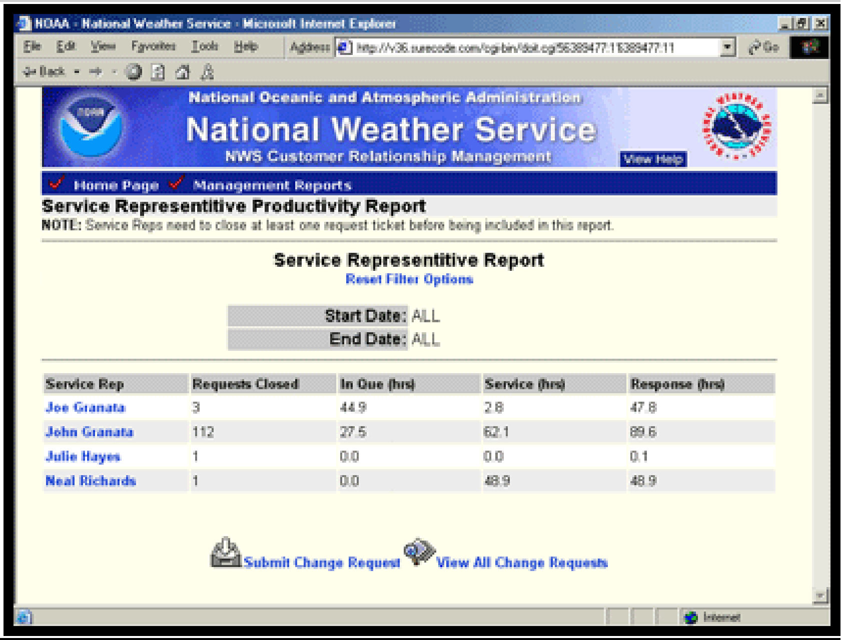
On Or After:	Limits report results to those on or later than the selected date. In others words, this field sets the **LOWER** date range for results.
On Or Before:	Limits report results to those on or before the selected date. In others words, this field sets the **UPPER** date range for results.

OTHER HELP PAGES RELATING TO THIS TOPIC
Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Department Response Time Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Service Representative Productivity Report
Supervisor Management Reports
System Wide Activity Report
System Wide Feedback Detail Report
System Wide Feedback Summary Report
System Wide Pipeline Report
System Wide Response Time Report
Tickets Grouped By Category
Tickets Grouped By Service Representative
Tickets Grouped By Source
Tickets Grouped By Status
Tickets Sorted By Date

User Manual & Documentation

PAGE TITLE

Service Representative Productivity Report



SYNOPSIS

Reports on individual Service Representative productivity in the selected date range.

HELP TOPIC

Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Report page.

DETAILED DESCRIPTION

Note: *A Service Representative needs to have serviced and closed at least* ***one*** *ticket in the selected date range in order to be listed in this report.*

In order for a Request Ticket to be included in this report, it must have been closed in the selected date range.

This report tabulates four key pieces of data for each Service Representative. These are: (1) Total Requests Closed, (2) In Que Time, (3) Service Time, and (4) Customer Response Time.

Each of these is defined and explained below.

Requests Closed:	Reports on the total number of tickets closed irrespective of when the ticket was originated. This number excludes any tickets in partial stages of service.
In Que:	This is the average number of hours that tickets were *sitting* prior to the start of service. This is the time between the origination of the ticket and the **first** clicking of the *Service This Request* link.
Service:	This computes the average number of hours that the Service Representative needed to close a ticket after they initiated service. This is the time between the **first** clicking of the *Service This Request* link and the closing of the ticket.
Response:	This is the average customer response time. This is the total of the *In Que* time and the *Service* time.

PAGE LINKS

Reset Filter Options:	Click here to reset the filter options for this report.
Service Rep:	Click here to view all requests closed by the listed Service Representative in the selected date range.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC
Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Department Response Time Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Supervisor Management Reports
System Wide Activity Report
System Wide Feedback Detail Report
System Wide Feedback Summary Report
System Wide Pipeline Report
System Wide Response Time Report
Tickets Grouped By Category
Tickets Grouped By Service Representative
Tickets Grouped By Source
Tickets Grouped By Status
Tickets Sorted By Date

User Manual & Documentation

PAGE TITLE

Supervisor Management Reports

SYNOPSIS

Used by the department Supervisor to select one of the many reports available.

HELP TOPIC

Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Reopens the current page. This item is provided for menu consistency between pages.

DETAILED DESCRIPTION

This page provides access to a wide variety of reports that have been grouped into four major categories: (1) Request Ticket, (2) Customer, (3) Customer Feedback, and (4) Productivity.

All of the reports available from this page support the capability to *drill-down* to get very low level data. In addition, most of these Supervisor reports provide a ability to select a particular date range for generating very targeting results.

The Request Ticket reports provide various ways to view and sort service requests that have been made to the department. The Customer reports provide visibility into the Customer Database. Recall that in version 1.0 of the system, this resource is shared by both the DM and OS modules. The Customer Feedback reports search the database of customer feedback built from the customer survey. And finally, the Productivity reports gives the Supervisor various ways to measure their departments productivity in getting customer requested serviced.

PAGE LINKS

Request Ticket Reports

Tickets Sorted By Date:	Shows tickets sorted by date. This report provides support for date selection.
Tickets Grouped By Category:	Requests sorted by date and grouped by category. This report provides support for date selection.
Tickets Grouped By Service Representative:	Requests sorted by date and grouped by service representative. This report provides support for date selection.
Tickets Grouped By Source:	Requests sorted by date and grouped by source. This report provides support for date selection.

USER INPUTS

None.

Tickets Grouped By Status:	Requests sorted by date and grouped by status. This report provides support for date selection.

Customer Reports

Customers Sorted By Affiliation:	All customers sorted by affiliation.
Customers Grouped By Affiliation:	All customers sorted and grouped by affiliation.
Customers Grouped By Type:	All customers sorted and grouped by type.

Customer Feedback Reports

Summary for Last 30 Days:	Customer feedback snapshot for the last thirty days.
Summary By Date:	Customer feedback for a given date range. This report supports date selection.
Details Grouped By Response Helpful:	Customer feedback grouped based on responses to the *Response Helpful* question. This report supports date selection.
Details Grouped By Response Timely:	Customer feedback grouped based on responses to the *Response Timely* question. This report supports date selection.
Details Grouped By Site Easy:	Customer feedback grouped based on responses to the *Site Easy* question. This report supports date selection.
User Comments By Date:	Narrative customer suggestions and feedback. This report supports date selection.

Productivity Reports

Service Representative Report By Date:	Reports on individual service representative productivity in the selected date range.
Request Activity Report By Date:	Reports on ticket activity in the selected date range. A ticket is active within a given date range if there has been any change within its status.

Request Pipeline Report By Date:	Reports on pipeline activity in the selected date range. A ticket is included in this report if it was created within the indicated date range irrespective of if there has been any change in its status.
Response Time Report By Date:	Reports on response time in the selected date range. In order order for a ticket to be included in this report, it must have been closed within the selected date range.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Department Response Time Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Service Representative Productivity Report
System Wide Activity Report
System Wide Feedback Detail Report
System Wide Feedback Summary Report
System Wide Pipeline Report
System Wide Response Time Report
Tickets Grouped By Category
Tickets Grouped By Service Representative
Tickets Grouped By Source
Tickets Grouped By Status
Tickets Sorted By Date

User Manual & Documentation

PAGE TITLE

System Wide Activity Report

SYNOPSIS

This report details system-wide activity and presents both aggregate and department level results.

HELP TOPIC

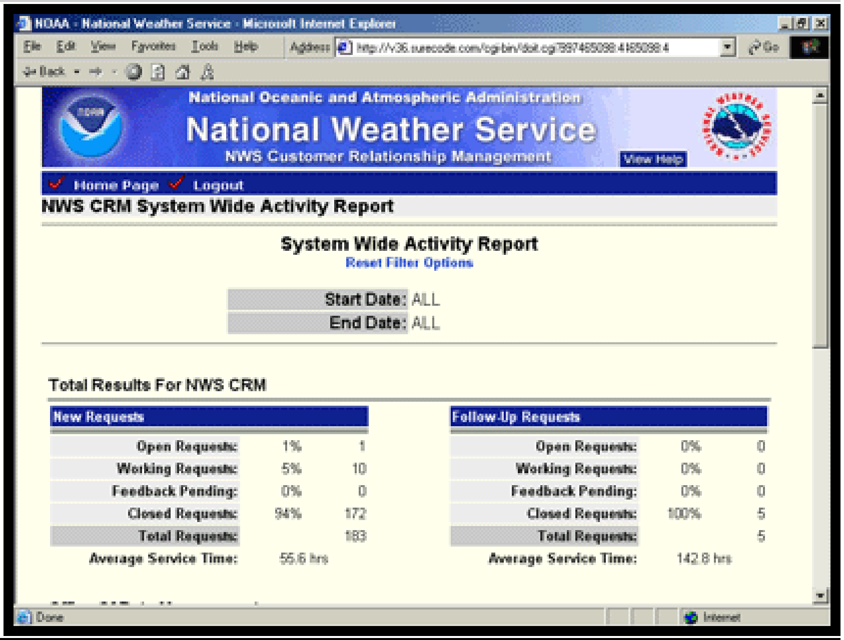
Reports

USER CLASS

Executive Reports

MENU SELECTIONS

Home Page:	Links to the Executive Home page.
Logout:	Logs out the current user and closes their session.



DETAILED DESCRIPTION

A service request is included on this report if there has been any change in its status within the selected date range.

Enterprise wide results are provided at the top of the page under the heading *Total Results For NWS CRM*. Below the aggregate numbers, the same results are broken down on a per department basis. The current system includes data for *Office Of Data Management* and *Office Of Services*.

When tabulating results, the system discerns between **New Requests** and **Follow-Up Requests**.

A New Request is logged every time a customer or Service Representative opens a new request for service. A Follow-Up Request results when a Service Representative responds to a customer, closes their request, and the customer proceeds to reply with an additional related issue.

If the number of follow-up requests is *low* in relation to the number of new, that is an indication that issues are being resolved thoroughly the first time. If not, this may indicate the need for further investigation.

The data for New Requests is shown on the left side of the page. Data for Follow-Up Requests is presented on the right side.

The following table provides additional clarification regarding the meaning of the various data points collected.

Open Requests:	A customer request that has not yet received any service.
Working Requests:	A customer request that is assigned to a particular Service Representative and has received some initial service - but remains unresolved.
Feedback Pending:	These indicate requests where a Service Representative has requested additional clarification from the customer and is waiting for feedback.
Closed Requests:	Requests that have been serviced and closed.
Total Requests:	The total of open, working, pending, and closed requests for the selected date range.
Average Service Time:	This number is based on closed requests in the selected date range. It reports the average number of hours necessary to close a customer request.

PAGE LINKS	
Reset Filter Options:	Click here to return to the Date Selection page to filter results using a new date range.

USER INPUTS
None.

OTHER HELP PAGES RELATING TO THIS TOPIC
Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Department Response Time Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Service Representative Productivity Report
Supervisor Management Reports
System Wide Feedback Detail Report
System Wide Feedback Summary Report
System Wide Pipeline Report
System Wide Response Time Report
Tickets Grouped By Category
Tickets Grouped By Service Representative
Tickets Grouped By Source
Tickets Grouped By Status
Tickets Sorted By Date

User Manual & Documentation

PAGE TITLE

System Wide Feedback Detail Report

SYNOPSIS

This report provides a detailed listing of customer feedback received in a given date range.

HELP TOPIC

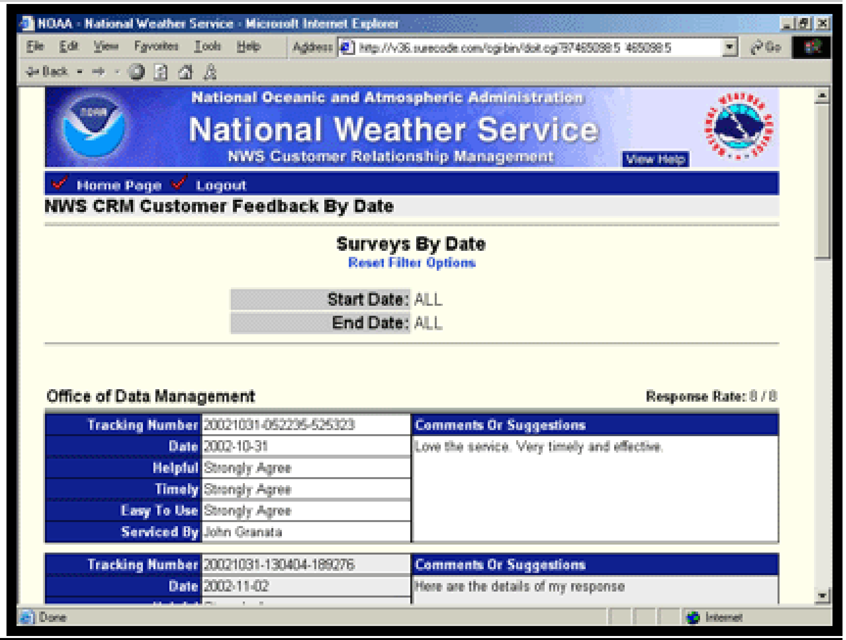
Reports

USER CLASS

Executive Reports

MENU SELECTIONS

Home Page:	Links to the Executive Home page.
Logout:	Logs out the current user and closes their session.



DETAILED DESCRIPTION

This report includes all customer surveys that were completed in the selected date range. Results are broken down on a per department basis with data for the *Office of Data Management* provided at the top of the report and results for the *Office Of Services* provided at the bottom.

PAGE LINKS

Reset Filter Options:	Click here to return to the Date Selection page to filter results using a new date range.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Department Response Time Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Service Representative Productivity Report
Supervisor Management Reports

User Manual & Documentation

PAGE TITLE

System Wide Feedback Summary Report

SYNOPSIS

This report provides a graphical summary of customer feedback received in a given date range.

HELP TOPIC

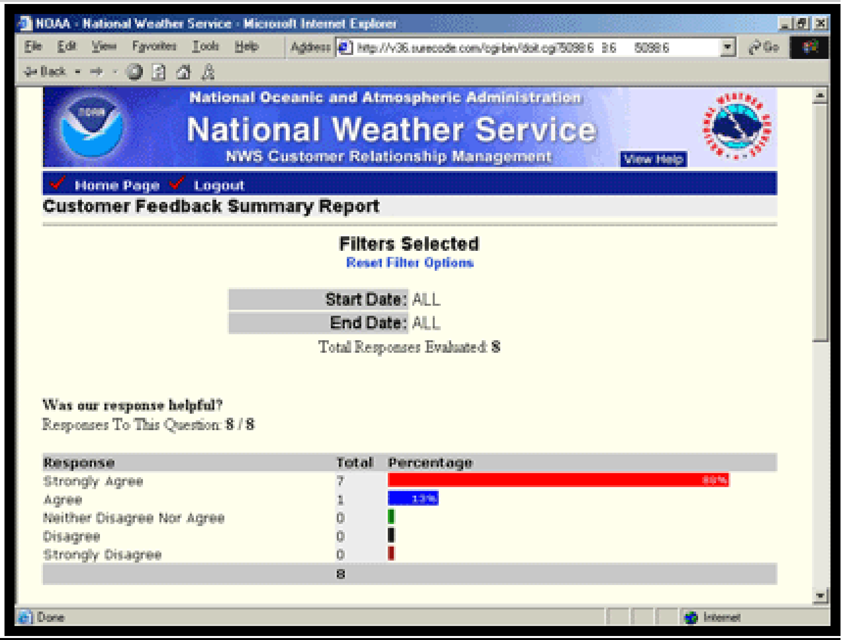
Reports

USER CLASS

Executive Reports

MENU SELECTIONS

Home Page:	Links to the Executive Home page.
Logout:	Logs out the current user and closes their session.



DETAILED DESCRIPTION

This report includes all customer surveys that were completed in the selected date range. Results are based on Enterprise wide feedback.

PAGE LINKS

Reset Filter Options:	Click here to return to the Date Selection page to filter results using a new date range.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Department Response Time Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Service Representative Productivity Report
Supervisor Management Reports
System Wide Activity Report
System Wide Feedback Detail Report

User Manual & Documentation

PAGE TITLE

System Wide Pipeline Report

SYNOPSIS

This report details system-wide pipeline status and presents both aggregate and department level results.

HELP TOPIC

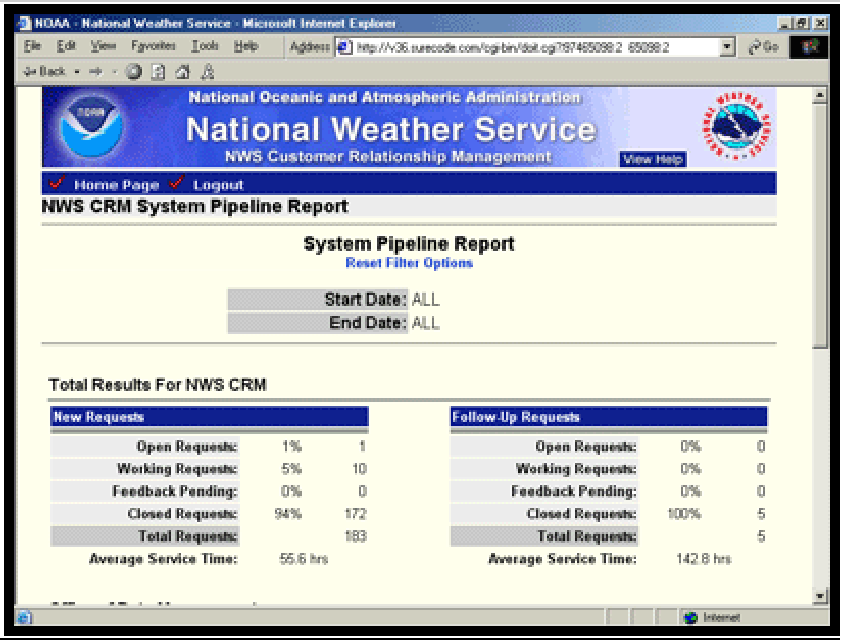
Reports

USER CLASS

Executive Reports

MENU SELECTIONS

Home Page:	Links to the Executive Level Home page.
Logout:	Logs out the current user and closes their session.



DETAILED DESCRIPTION

A service request is included on this report if it was originated within the selected date range irrespective of any change in its status.

Enterprise wide results are provided at the top of the page under the heading *Total Results For NWS CRM*. Below the aggregate numbers, the same results are broken down on a per department basis. The current system includes data for *Office Of Data Management* and *Office Of Services*.

When tabulating results, the system discerns between **New Requests** and **Follow-Up Requests**.

A New Request is logged every time a customer or Service Representative opens a new request for service. A Follow-Up Request results when a Service Representative responds to a customer, closes their request, and the customer proceeds to reply with an additional related issue.

If the number of follow-up requests is *low* in relation to the number of new, that is an indication that issues are being resolved thoroughly the first time. If not, this may indicate the need for further investigation.

The data for New Requests is shown on the left side of the page. Data for Follow-Up Requests is presented on the right side.

The following table provides additional clarification regarding the meaning of the various data points collected.

Open Requests:	A customer request that has not yet received any service.
Working Requests:	A customer request that is assigned to a particular Service Representative and has received some initial service - but remains unresolved.
Feedback Pending:	These indicate requests where a Service Representative has requested additional clarification from the customer and is waiting for feedback.
Closed Requests:	Requests that have been serviced and closed.
Total Requests:	The total of open, working, pending, and closed requests for the selected date range.
Average Service Time:	This number is based on closed requests in the selected date range. It reports the average number of hours necessary to close a customer request.

PAGE LINKS	
Reset Filter Options:	Click here to return to the Date Selection page to filter results using a new date range.

USER INPUTS
None.

OTHER HELP PAGES RELATING TO THIS TOPIC
Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Department Response Time Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Service Representative Productivity Report
Supervisor Management Reports
System Wide Activity Report
System Wide Feedback Detail Report
System Wide Feedback Summary Report
System Wide Response Time Report
Tickets Grouped By Category
Tickets Grouped By Service Representative
Tickets Grouped By Source
Tickets Grouped By Status
Tickets Sorted By Date

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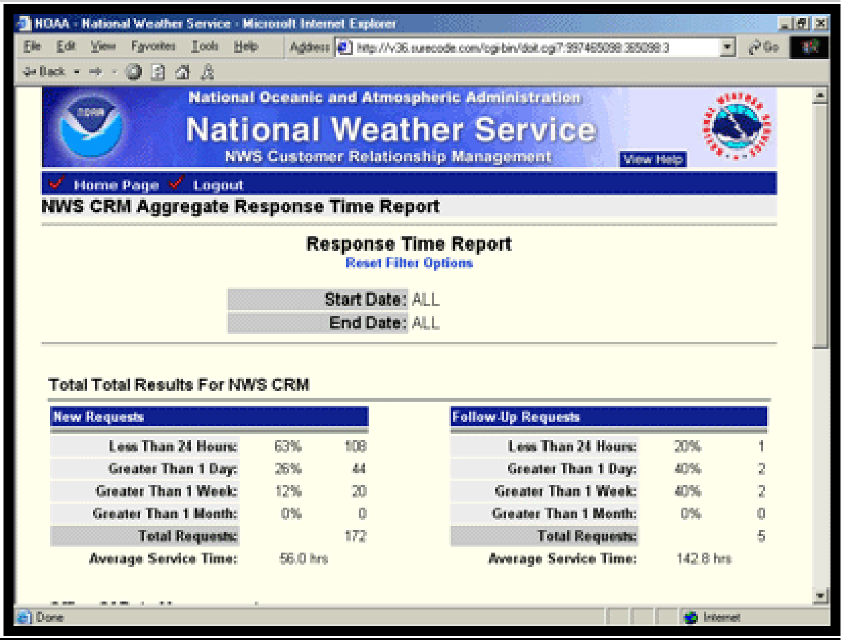
PAGE TITLE

System Wide Response Time Report

SYNOPSIS

This report provides a breakdown of the response time for requests serviced in a selected date range. Results are presented at both the aggregate and department levels.



HELP TOPIC

Reports

USER CLASS

Executive Reports

MENU SELECTIONS

Home Page:	Links to the Executive Home page.
Logout:	Logs out the current user and closes their session.

DETAILED DESCRIPTION

A service request is included on this report if it was closed within the selected date range.

Enterprise wide results are provided at the top of the page under the heading *Total Results For NWS CRM*. Below the aggregate numbers, the same results are broken down on a per department basis. The current system includes data for *Office Of Data Management* and *Office Of Services*.

When tabulating results, the system discerns between **New Requests** and **Follow-Up Requests**.

A New Request is logged every time a customer or Service Representative opens a new request for service. A Follow-Up Request results when a Service Representative responds to a customer, closes their request, and the customer proceeds to reply with an additional related issue.

If the number of follow-up requests is *low* in relation to the number of new, that is an indication that issues are being resolved thoroughly the first time. If not, this may indicate the need for further investigation.

The data for New Requests is shown on the left side of the page. Data for Follow-Up Requests is presented on the right side.

The following table provides additional clarification regarding the meaning of the various data points collected.

Less Than 24 Hours:	Requests closed within 24 hours of the original customer contact. This includes those requests that were closed directly by the customer using the integrated FAQ database.
Greater Than 1 Day:	Includes all requests that required less than a 1 week but more than 1 day to resolve.
Greater Than 1 Week:	Includes all requests that required less than a 1 month but more than 1 week to resolve.
Greater Than 1 Month:	Includes all requests that required 1 month or more time to resolve.
Total Requests:	The total number of requests closed within the selected date range.
Average Service Time:	Reports the average number of hours necessary to close a customer request during the selected date range.

PAGE LINKS	
Reset Filter Options:	Click here to return to the Date Selection page to filter results using a new date range.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days
Customers Grouped By Affiliation
Customers Grouped By Type
Customers Sorted By Affiliation
Department Activity Report
Department Pipeline Report
Department Response Time Report
Feedback Comments By Date
Feedback Grouped By Response Helpful
Feedback Grouped By Response Timely
Feedback Grouped By Site Easy
Feedback Summary Report
Filter Results By Date
Service Representative Productivity Report
Supervisor Management Reports
System Wide Activity Report
System Wide Feedback Detail Report
System Wide Feedback Summary Report
System Wide Pipeline Report
Tickets Grouped By Category
Tickets Grouped By Service Representative
Tickets Grouped By Source
Tickets Grouped By Status
Tickets Sorted By Date

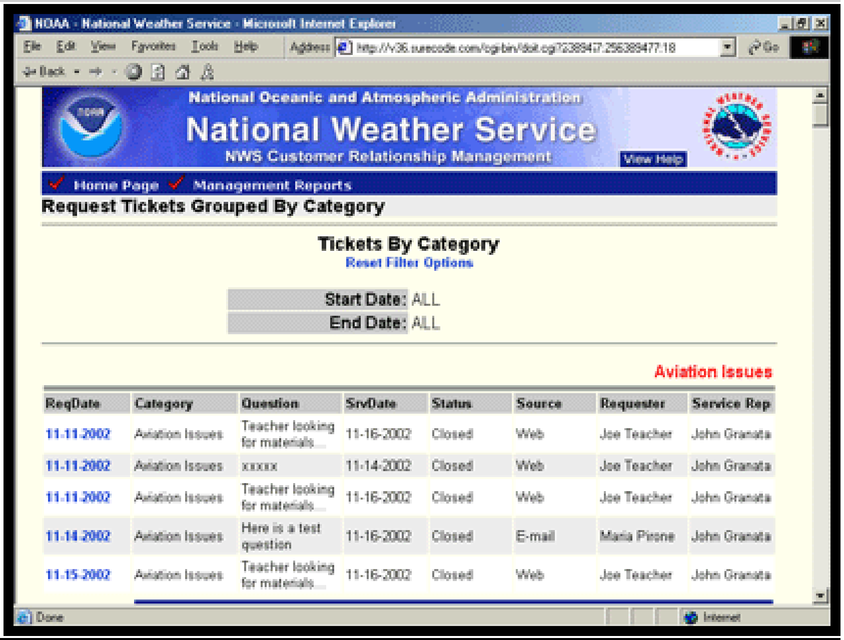
User Manual & Documentation

PAGE TITLE

Tickets Grouped By Category

SYNOPSIS

This report shows all the Request Tickets in the selected date range, sorted by date and grouped by category.



HELP TOPIC

Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.

DETAILED DESCRIPTION

Requests sorted by date and grouped by category. This report provides support for date selection.

PAGE LINKS

Reset Filter Options:	Click here to reset the filter options for this report.
ReqDate:	Click here to view the detail page for this request.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days

Customers Grouped By Affiliation

Customers Grouped By Type

Customers Sorted By Affiliation

Department Activity Report

Department Pipeline Report

Department Response Time Report

Feedback Comments By Date

Feedback Grouped By Response Helpful

Feedback Grouped By Response Timely

Feedback Grouped By Site Easy

Feedback Summary Report

Filter Results By Date

Service Representative Productivity Report

Supervisor Management Reports

System Wide Activity Report

National Weather Service: Customer Relationship Management System

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User Manual & Documentation

PAGE TITLE

Tickets Grouped By Service Representative

SYNOPSIS

Requests sorted and grouped by date and Service Representative.

HELP TOPIC

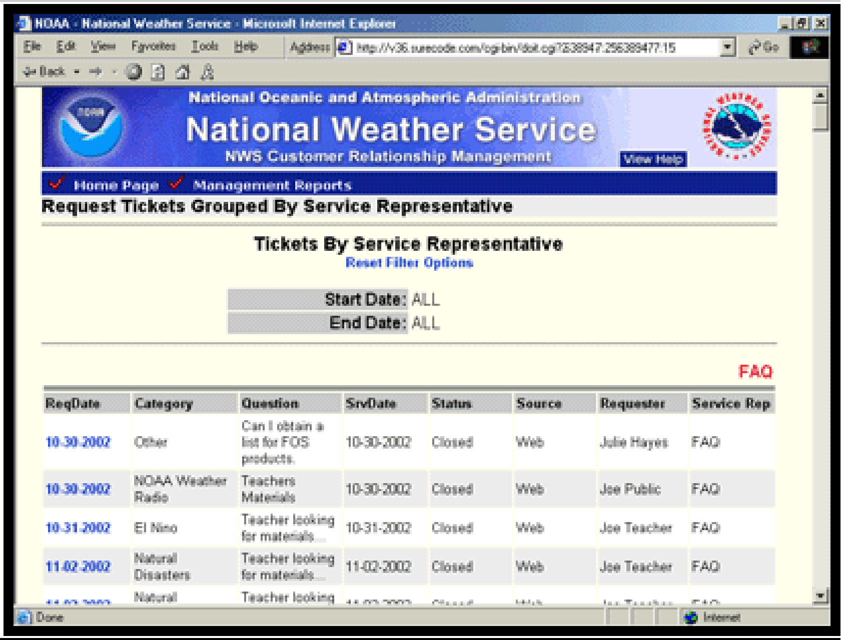
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.



DETAILED DESCRIPTION

Requests sorted by date and grouped by Service Representative. This report provides support for date selection.

PAGE LINKS

Reset Filter Options:	Click here to reset the filter options for this report.
ReqDate:	Click here to view the detail page for this request.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

- Customer Satisfaction For The Last 30 Days
- Customers Grouped By Affiliation
- Customers Grouped By Type
- Customers Sorted By Affiliation
- Department Activity Report
- Department Pipeline Report
- Department Response Time Report
- Feedback Comments By Date
- Feedback Grouped By Response Helpful
- Feedback Grouped By Response Timely
- Feedback Grouped By Site Easy
- Feedback Summary Report
- Filter Results By Date
- Service Representative Productivity Report
- Supervisor Management Reports
- System Wide Activity Report

National Weather Service: Customer Relationship Management System

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User Manual & Documentation

PAGE TITLE

Tickets Grouped By Source

SYNOPSIS

Requests sorted by date and grouped by source.

HELP TOPIC

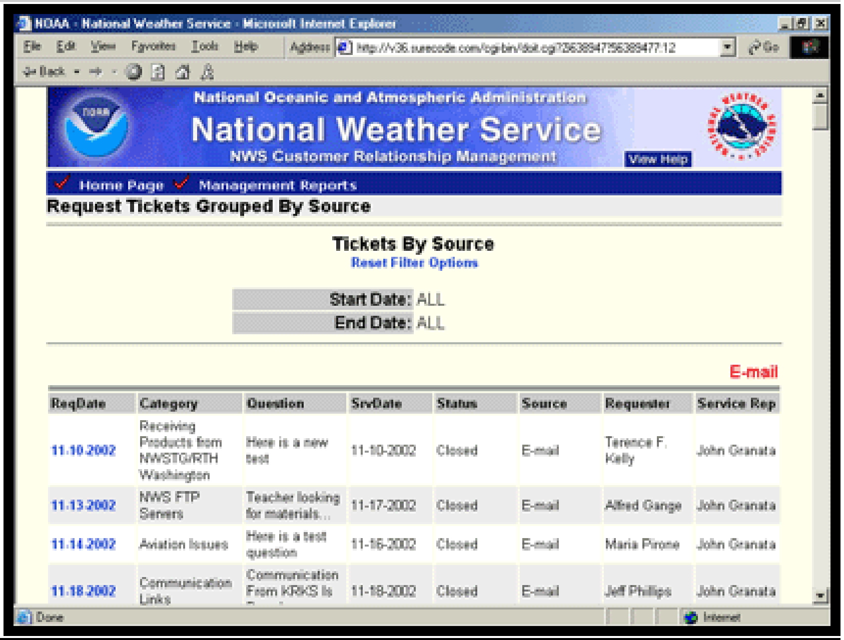
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.



DETAILED DESCRIPTION

Requests sorted by date and grouped by source. This report provides support for date selection.

PAGE LINKS

Reset Filter Options:	Click here to reset the filter options for this report.
ReqDate:	Click here to view the detail page for this request.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days

Customers Grouped By Affiliation

Customers Grouped By Type

Customers Sorted By Affiliation

Department Activity Report

Department Pipeline Report

Department Response Time Report

Feedback Comments By Date

Feedback Grouped By Response Helpful

Feedback Grouped By Response Timely

Feedback Grouped By Site Easy

Feedback Summary Report

Filter Results By Date

Service Representative Productivity Report

Supervisor Management Reports

System Wide Activity Report

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National Weather Service: Customer Relationship Management System

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User Manual & Documentation

PAGE TITLE

Tickets Grouped By Status

SYNOPSIS

Requests sorted by date and grouped by status.

HELP TOPIC

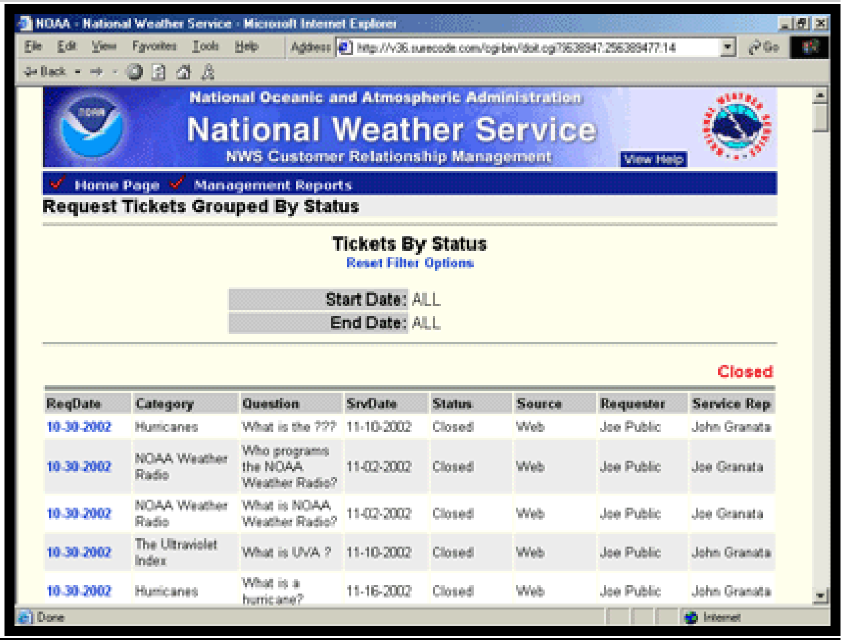
Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.



DETAILED DESCRIPTION

Requests sorted by date and grouped by status. This report provides support for date selection

PAGE LINKS

Reset Filter Options:	Click here to reset the filter options for this report.
ReqDate:	Click here to view the detail page for this request.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days

Customers Grouped By Affiliation

Customers Grouped By Type

Customers Sorted By Affiliation

Department Activity Report

Department Pipeline Report

Department Response Time Report

Feedback Comments By Date

Feedback Grouped By Response Helpful

Feedback Grouped By Response Timely

Feedback Grouped By Site Easy

Feedback Summary Report

Filter Results By Date

Service Representative Productivity Report

Supervisor Management Reports

System Wide Activity Report

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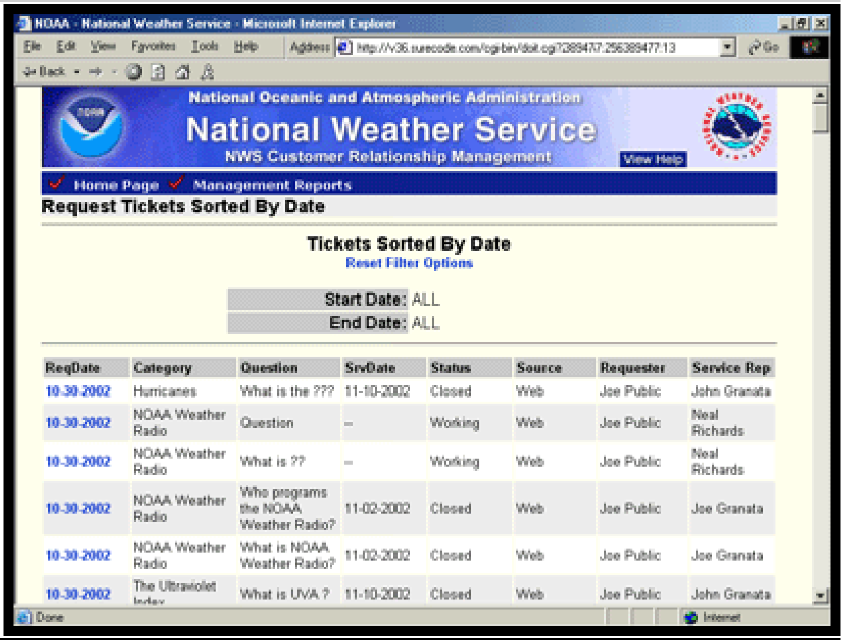
User Manual & Documentation

PAGE TITLE

Tickets Sorted By Date

SYNOPSIS

This report shows all the Request Tickets in the selected date range, sorted by date.



HELP TOPIC

Reports

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Management Reports:	Links to the Supervisor Reports page.

DETAILED DESCRIPTION

Shows tickets sorted by date. This report provides support for date selection.

PAGE LINKS

Reset Filter Options:	Click here to reset the filter for this report.
ReqDate:	Click here to view the full details of this listing.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Satisfaction For The Last 30 Days

Customers Grouped By Affiliation

Customers Grouped By Type

Customers Sorted By Affiliation

Department Activity Report

Department Pipeline Report

Department Response Time Report

Feedback Comments By Date

Feedback Grouped By Response Helpful

Feedback Grouped By Response Timely

Feedback Grouped By Site Easy

Feedback Summary Report

Filter Results By Date

Service Representative Productivity Report

Supervisor Management Reports

System Wide Activity Report

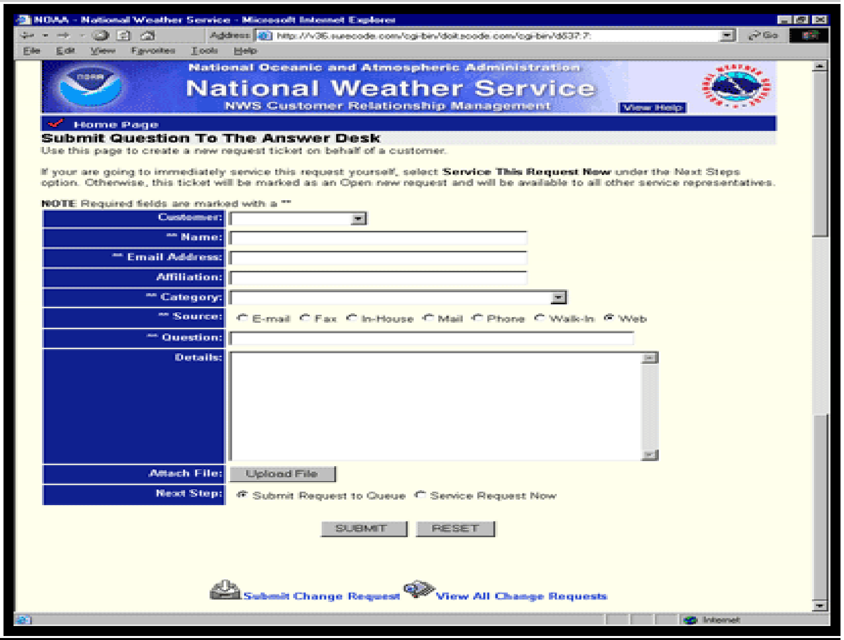
User Manual & Documentation

PAGE TITLE

Create Ticket Page

SYNOPSIS

This is what a service representative sees when adding a request.



HELP TOPIC

Request Database

USER CLASS

Service Representative

MENU SELECTIONS

Home Page:	Returns user to Service Rep home page.

DETAILED DESCRIPTION

A service rep can enter a request via this interface.

PAGE LINKS

None

USER INPUTS

Customer:	List of frequent customers. Choosing a name from this list will prepopulate Name, Email Address and Affiliation if they are known.
Name:	Name of requester.
Email Address:	Email address of customer.
Affiliation:	Affiliation of customer.
Category:	Category in which this request falls into.
Source:	Source of request.
Question:	Question in request.
Details:	Details of question in request.
Attach File:	Attach a file with request.
Next Step:	What to do after adding the request.

OTHER HELP PAGES RELATING TO THIS TOPIC

Make Referral

Request Database Detail Page

Request Database List Page

Request Database Search Page

Service this Request

User Manual & Documentation

PAGE TITLE

Make Referral

SYNOPSIS

Use this page to send a referral to one or more third parties.

HELP TOPIC

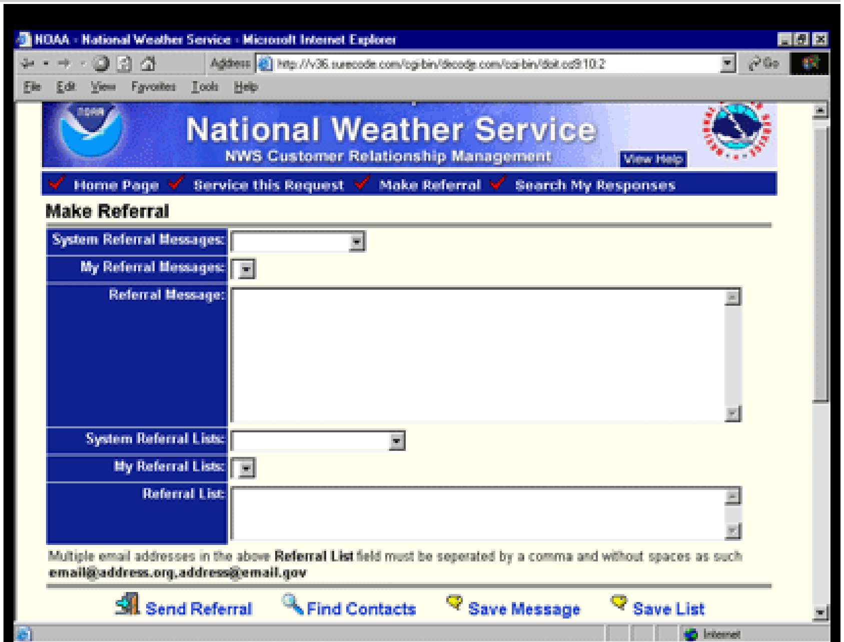
Request Database

USER CLASS

Service Representative

MENU SELECTIONS

Home Page:	Click here to go to your Home page.
Service this Request:	Click here to open the Service This Request page.
Make Referral:	Re-opens the current page. This is provided for consistency between page menus.
Search My Responses :	Click here to search the My Response database.



DETAILED DESCRIPTION

To make a referral you need to enter a message and establish who to send it to. Just like the Service This Request page, this page provides resources to help to do this easily by automating repetitive tasks and making the right resources available at your fingertips.

The Send Referral page is divided into two sections. The bottom part of the page displays key information pertaining to the customer request. This is provided for reference while composing your referral message. The top half of the page provides various input fields to help you compose and address the referral.

The system supports the ability to select a predefined message and/or referral list from either the system list or from your *personal collection*. After you pick which to use, your selections are automatically loaded into the appropriate fields – in this case either the Referral Message or the Referral List fields.

To establish the referral message, select from the System Referral Messages, My Referral Messages, or type directly into the Referral Message field. To establish who needs to receive your message, select from the System Referral Lists, My Referral Lists, or type directly into the Referral Lists field. To save either the message or the list for next time, click on the **Save Message** or **Save List** links.

After the referral is composed and addressed, click the **Send Referral** link to send it out. Since sending a referral does not explicitly affect the status of a ticket, you need to do this next. The system opens the **Service This Request** page after every referral. Use this to update the status of the ticket as necessary.

PAGE LINKS

Send Referral:	Click here to send the contents of the Referral Message field to the recipients listed in the Referral List. Sending a referral does not produce any change in the tickets status.
Find Contacts:	Opens the Search page of the Referral database to find referrals.

USER INPUTS

The following provides detail regarding the available input fields. After you make any necessary edits, click the **Send Referral** link to send your referral and go to the Service This Request page.

System Referral Messages:	Loads the Referral Message field with a system-level predefined message based on the selected item.
My Referral Messages:	Loads the Referral Message field with a user-level predefined message based on the selected item.

Save Message:	Saves the contents of the Referral Message field into the Referral Messages database so they can used used again at some point in the future. Saved messages are available the next time the Make Referral page is opened.
Save List:	Saves the contents of the Referral List field to the Referral Lists database so this can be used again at some point in the future. This is available the next time the Make Referral page is opened.

Referral Message:	This field should contain the message that will be sent to the referral list. This can be automatically loaded by selecting from those available in the System Referral Messages or My Referral Messages fields. You can also type directly into this field to create your message by hand.
System Referral Lists:	Loads the Referral Lists field with a system-level predefined list based on the selected item.
My Referral Lists:	Loads the Referral Lists field with a user-level predefined list based on the selected item.
Referral List:	This field should contain the referral lists to receive the message. This can be automatically loaded by selecting from those available in the System Referral Lists or My Referral Lists fields. You can also type directly into this field to create your list by hand.

OTHER HELP PAGES RELATING TO THIS TOPIC

Create Ticket Page
Request Database Detail Page
Request Database List Page
Request Database Search Page
Service this Request

User Manual & Documentation

PAGE TITLE

Request Database Detail Page

SYNOPSIS

Use this page to review the complete history of a customer request.

HELP TOPIC

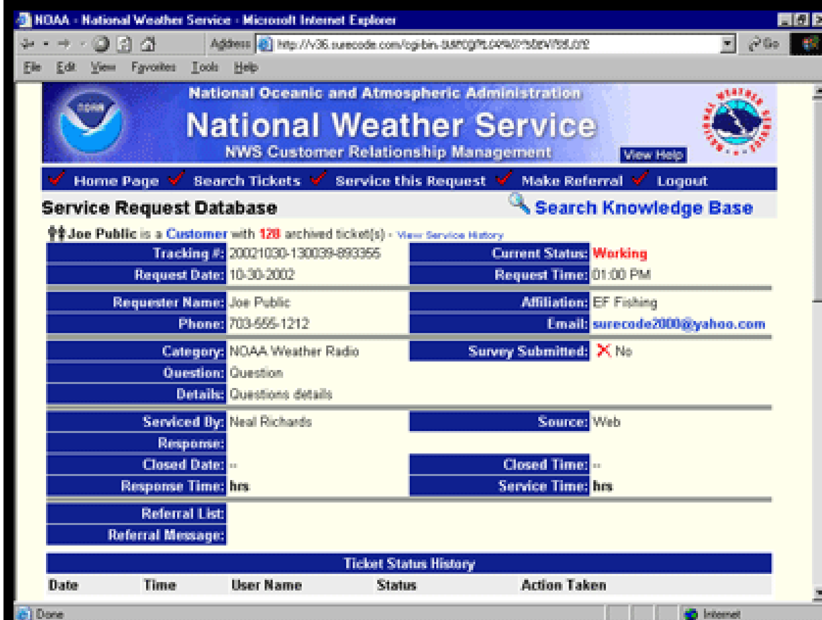
Request Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Home Page:	Click here to go to your Home page.
Search Tickets:	Click here to search the Request Ticket database.
Service this Request:	Click here to open the Service Request page for this ticket.
Make Referral:	Click here to open the Make Referral page for this ticket.
Logout:	Click here to logout and close your current session.



DETAILED DESCRIPTION

The Request Detail page pulls together all of the information pertaining to a request and the customer making it, and provides all of this data in one place. The page can be divided into six sections starting from the top and working down. The sections are the: (1) Header, (2) Request Data, (3) Service Data, (4) Status History, (5) Follow-Up History, and (6) Notes.

(1) The Header is provided at the very top of the page and provides data and links regarding the customer. A customer is identified via the email address that they are required to provide when they make a request. The system uses this address to search the Customer database and the archive of previous tickets to find relevant data. If the customer is found in the Customer data, a link to their customer record is provided here. Click this to open another page that provides a rich set of important data. If the customer is not found in the database, the header includes a link to add this customer so this data will be available in the future.

The header also includes data extracted from the Request database. The total number of requests originated from this customer is listed. The complete listing of these is available by clicking the View Service History link.

(2) The next section provides details entered by the customer when they made their request. The date and time when the request was made is also recorded and available in this section.

(3) Following this, we have the Service Data section. This includes information about the Representative that serviced the request, their response to the customer, and key performance data. Also included in this section is a record of any referrals that have been made as result of this request.

(4) After this, we see the complete ticket status history for this request. Every time *something happens* to change the status of this request an entry is created here. This includes: what the action was, the date, the time, the person performing the action, and the new status of the ticket established as a result of the action.

(5) Next comes the Follow-Up history. Any and all follow-ups initiated by the customer that related back to the original tracking number are listed here.

(6) Finally, the Notes section lists all of the notes recorded pertaining to this request.

PAGE LINKS

Note that the following list includes the complete set of links that are available from this page. Depending on the status of the request, the customer, and the user class of the viewer, not all of these links will be available at all times.

The details pertaining to what is available - and when - are provided in the following explanations.

Search Knowledge Base:	Used to search the Knowledge Base database for information that could help resolve this request.
Customer:	This link is available when the email address of the individual making the request is stored in the Customer database. In this case, clicking on the link will open the Customer database to the correct record and reveal many additional details about this customer.
Customer Database:	This link is available when the email address of the individual making the request is **NOT** stored in the Customer database. In this case, clicking on the link will open the Customer database Add page.
View Service History:	Click here to see a complete history of the previous requests originated by this customer.
Tracking #:	This link is available if the current request is a follow-up to a previous ticket. In this case, clicking here opens the request detail page for that original request.
Email:	If clicked, this opens your local mail client and pre-loads the indicated email address to the **To:** field.
Add Note:	Click here to add a note to this request.
Survey Submitted:	This link is available in the case where the customer has responded to the customer survey. In this case, clicking on this link opens a page that reveals the customer's feedback.
Click Here:	This link is only visible to Supervisors and is used to re-open a request ticket regardless of its current status.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC
Create Ticket Page
Make Referral
Request Database List Page
Request Database Search Page
Service this Request

11

User Manual & Documentation

PAGE TITLE

Request Database List Page

SYNOPSIS

This page shows the requests that match your search or selection.

HELP TOPIC

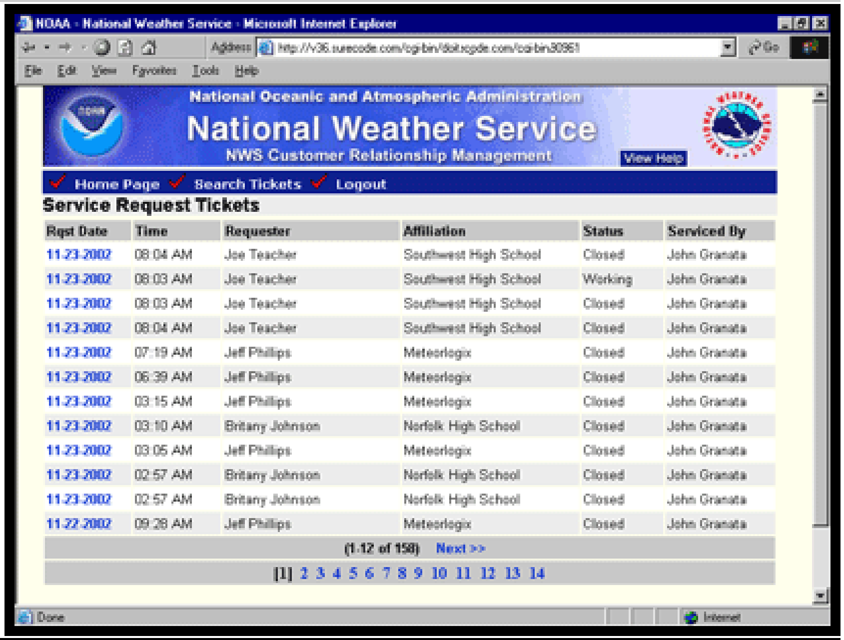
Request Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor or Service Representative Home page.
Search Tickets:	Click here to open the Search page.
Logout:	Click here to end your session.



DETAILED DESCRIPTION

This page can be produced in several ways, by clicking on a *drill-down* link, by doing a search, or by browsing all the records listed in the Request Tickets database.

PAGE LINKS

Rqst Date:	Click here to view the full details of this listing.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Create Ticket Page

Make Referral

Request Database Detail Page

Request Database Search Page

Service this Request

User Manual & Documentation

PAGE TITLE

Request Database Search Page

SYNOPSIS

Use this page to search the request ticket database for a particular service request.

HELP TOPIC

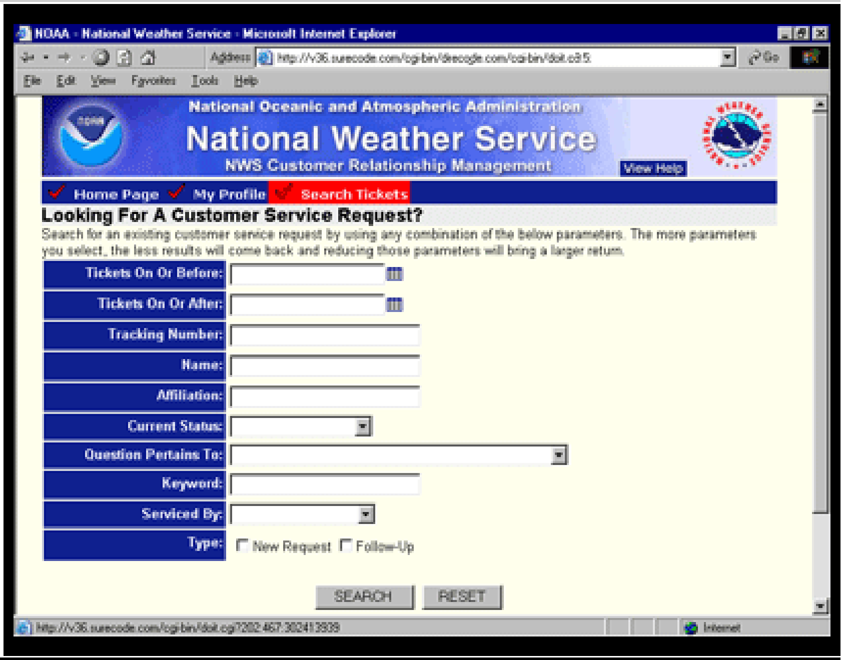
Request Database

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Home Page:	Takes user to the Supervisor or Service Representative Home page.
My Profile:	Takes user to the Supervisor or Service Representative Profile page.
Search Tickets:	Click here to open the Search Tickets page.



DETAILED DESCRIPTION

This page gives you great flexibility in searching the request database. You can choose any combination of the provided selection criteria. The more criteria you select, the more focused your results will be. To list every request in the request database, just leave all the input fields blank and click the **SEARCH** button.

PAGE LINKS

None

USER INPUTS

After select one or more criteria from the options shown below, click the **Search** button to build your list.

Tickets On Or Before:	Search for request tickets created on or before the indicated date.
Tickets On Or After:	Search for Request tickets created on or after the indicated date.
Tracking Number:	Search for tickets with the provided tracking number or fragment.
Name:	Search for tickets with the provided name or name fragment.
Affiliation:	Search for tickets with the indicated affiliation.
Current Status:	Search for tickets with the selected status.
Question Pertains To:	Search based on the request category.
Keyword:	Search based on the following keywords. Multiple words are combined using a logical *AND*. The keywords are matched against all available information fields.
Serviced By:	Find tickets serviced by the selected Service Representative.
Type:	Search for New or Follow-Up Requests.

OTHER HELP PAGES RELATING TO THIS TOPIC
Create Ticket Page
Make Referral
Request Database Detail Page
Request Database List Page
Service this Request

6

User Manual & Documentation

PAGE TITLE

Service this Request

SYNOPSIS

Use this page to service a customer request.

HELP TOPIC

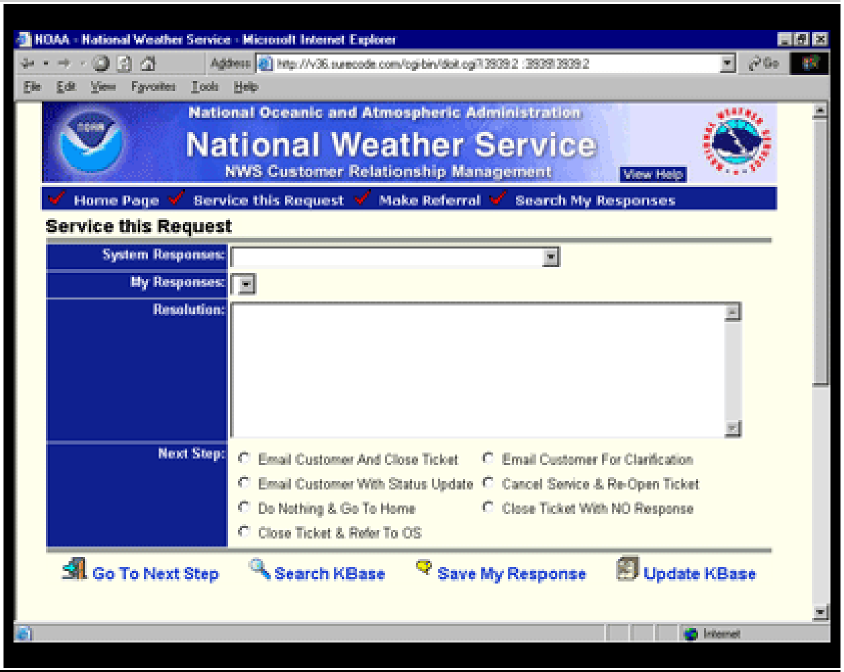
Request Database

USER CLASS

Service Representative

MENU SELECTIONS

Home Page:	Click here to go to your Home page.
Service this Request:	Re-opens the current page. This is provided for consistency between page menus.
Make Referral:	Click here to open the Make Referral page.
Search My Responses :	Click here to search the My Response database.



DETAILED DESCRIPTION

The Service This Request page is divided into two sections. The bottom part of the page displays key information pertaining to the customer request. This is provided so that you can refer to this while responding. At the very bottom of this section we also include the ability to attach a file to the Request Ticket. Whatever type of file you upload using this feature, it will be available to other Service Representatives and Supervisors.

When attaching files, please note that the person receiving the file needs to have an appropriate *viewer* for whatever file type you upload. For example, it you upload an MS Excel spreadsheet, but a user only has Lotus 123, then they would not be able to open the file after it is downloaded.

The top half of the page provides various input fields to help you respond to the request and close the ticket. The system supports the ability to select either a predefined system response or one from your *personal collection*. Your personal responses are items that you have saved at some point in the past. The quick response data is automatically loaded into the Resolution field as items are picked off of the predefined selection lists. To pick a system response, select from the System Responses field. To pick one of your own responses, select from the My Responses field.

If this is a *one-of-a-kind* issue and there is nothing on the quick response lists that would be appropriate, you can just type your answer in the Resolution field. What ever data you enter into this field will be emailed back to the customer and stored in the system.

Note that you can also combine the automatic and manual approaches. This can sometimes save a lot of time. First select one of the predefined resolutions off the quick response lists and then edit the text that was loaded to address the current situation.

When you done, you have the option of saving your answer so that you can use it again at some point in the future. When you click the **Save My Response** link at the center of the page, any text in the Resolution field is preloaded to the Add page of the My Resolution database. Add a title and click the **ADD** button and this information will appear on your My Responses list the next time you service a request.

In addition to saving responses, the system also makes it very easy to capture an entire issue - including both the original question and its resolution - for storage into the Knowledge Base database where they will accessible to all who might encounter similar issues in the future. When you click on the **Update Kbase** link, the necessary add page opens with most of the field already pre-filled. Make any necessary edits, add some optional keywords, and click the **ADD** button.

The only step that remains is to establish the next steps. You need to select from one of the available choices from the **Next Step** field and click the **Go To Next Step** link located at the center of the page. A detailed explaining of the various choices is provided below. The status of the ticket will be updated based on what you pick and, in most cases, you will return back to your Home page.

PAGE LINKS

Go To Next Step:	Triggers the next step in the workflow based on the selected *Next Step*. See the discussion below for a detailed presentation of the available options.
Search KBase:	Open the search page of the Knowledge Base database. Use this link to look for a resolution to the current issue.
Save My Response:	Save the contents of the Resolution field into the My Response database so it can be reused again at some point in the future. This response will be available in the My Responses selection list the next time you service a request.
Update KBase:	Update the Knowledge Base database with the contents of the Resolution field. This will make your response available to other Service Representatives on your team.

USER INPUTS

The following provides detail regarding the available input fields. After you make any necessary edits, click the **Go To Next Step** link to save your changes.

System Responses:	Loads the Resolution field with a system-level predefined response based on the selected item.
My Responses:	Loads the Resolution field with a user- level predefined response based on the selected item.
Resolution:	This field should contain the resolution information that will be sent to the customer. This can be automatically loaded by selecting from the available responses in the System Response or My Response fields. You can also type directly into this field to create your response.
Next Step:	This field establishes the status of the request ticket, and actions taken by the system, after you click the **Go To Next Step** link. See the table shown below is a detailed explanation of each choice.

Meaning of the Various Next Step Options

Email Customer And Close Ticket:	The contents of the Resolution field is emailed to the customer and the status of the ticket is set to *Closed*.
Email Customer For Clarification:	The status of the ticket is changed to *Feedback Pending* and the contents of the Resolution field is emailed to the customer. The ticket remains in this state until the customer responds, after which, the status is reset to *Working*.
Email Customer With Status Update:	No change in ticket status, but the customer is emailed the contents of the Resolution field.
Cancel Service & Re-Open Ticket:	The status of the ticket is reset to *Open* thus making it available to other Service Representatives to service. **NO** response is sent to the customer.
Do Nothing & Go To Home:	No change in ticket status and **NO** response is sent to the customer. This has the same effect as clicking the Home link in the menu bar.
Close Ticket With NO Response:	The ticket status is set to *Closed* and **NO** response is sent to the customer.
Close Ticket & Refer To OS:	The status of ticket is set to *Closed*. A new *Open* ticket is created in the OS Module. **NO** response is sent to the customer.

Close Ticket & Refer To DM:	The status of ticket is set to *Closed*. A new *Open* ticket is created in the DM Module. **NO** response is sent to the customer.

OTHER HELP PAGES RELATING TO THIS TOPIC
Create Ticket Page
Make Referral
Request Database Detail Page
Request Database List Page
Request Database Search Page

127

User Manual & Documentation

PAGE TITLE

Categories For Customer Database

SYNOPSIS

Use this page to add and edit categories for the Customer database.

HELP TOPIC

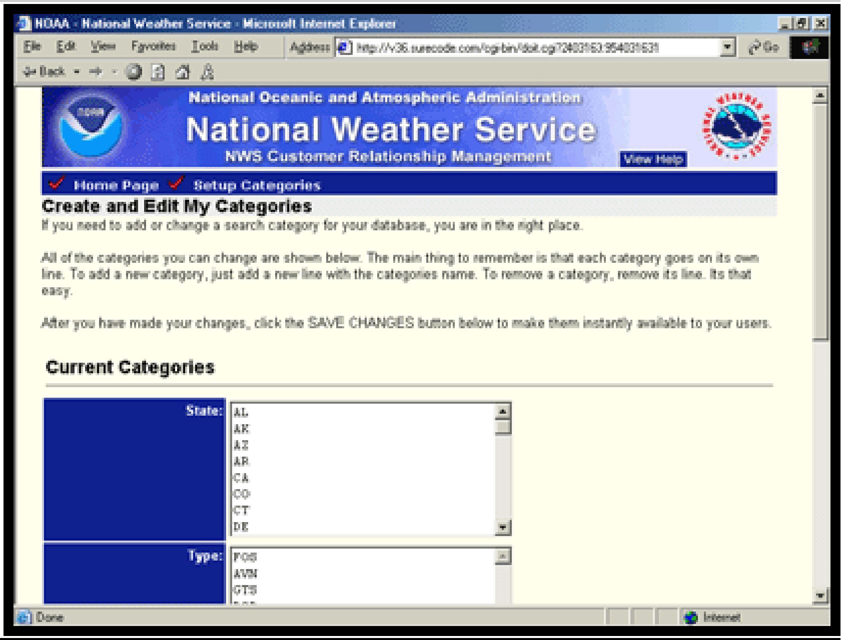
Setup Categories

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor Home page.
Setup Categories:	Click here to return to the Categories Setup page.



DETAILED DESCRIPTION

All of the categories you can change are shown below. The main thing to remember is that each category goes on its own line. To add a new category, just add a new line with the categories name. To remove a category, remove its line.

Do not use any punctuation marks or special characters except for commas and periods. Be careful not to introduce any blank lines either above, below, or in the middle of the list.

In most cases, the categories will be presented in the order in which they are listed here. It is OK to reorder the list so the most frequently used selections appear near the top. In general, the position of an item in the list does not impact any system functions and is only relevant to user presentation.

PAGE LINKS

None.

USER INPUTS

State:	The list of customer states.
Type:	The list of customer types.
Service Subscriptions:	The list of available subscription services.
OPR:	List of available OPR offices.

OTHER HELP PAGES RELATING TO THIS TOPIC

Categories For Customer Survey

Categories For Knowledge Base

Categories For Mail List

Categories For Referral Database

Categories For Request Tickets

Categories For Service Rep Locations

Setup & Edit Categories

User Manual & Documentation

PAGE TITLE

Categories For Customer Survey

SYNOPSIS

Use this page to add and edit answers categories for the Customer Survey.

HELP TOPIC

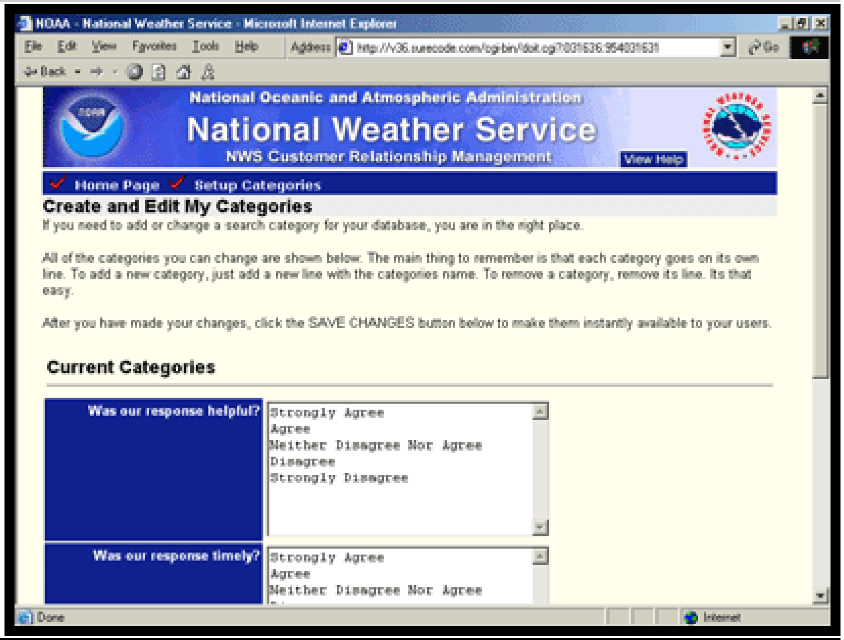
Setup Categories

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor Home page.
Setup Categories:	Click here to return to the Categories Setup page.



DETAILED DESCRIPTION

All of the categories you can change are shown below. The main thing to remember is that each category goes on its own line. To add a new category, just add a new line with the categories name. To remove a category, remove its line.

Do not use any punctuation marks or special characters except for commas and periods. Be careful not to introduce any blank lines either above, below, or in the middle of the list.

In most cases, the categories will be presented in the order in which they are listed here. It is OK to reorder the list so the most frequently used selections appear near the top. In general, the position of an item in the list does not impact any system functions and is only relevant to user presentation.

PAGE LINKS

None.

USER INPUTS

Was our response helpful:	List of possible answers for the *response helpful* question.
Was our response timely:	List of possible answers for the *response timely* question.
Was the customer service area of our web site easy to use:	List of possible answers for the *site easy* question.

OTHER HELP PAGES RELATING TO THIS TOPIC

Categories For Customer Database

Categories For Knowledge Base

Categories For Mail List

Categories For Referral Database

Categories For Request Tickets

Categories For Service Rep Locations

Setup & Edit Categories

User Manual & Documentation

PAGE TITLE

Categories For Knowledge Base

SYNOPSIS

Use this page to add and edit categories for the Knowledge Base database.

HELP TOPIC

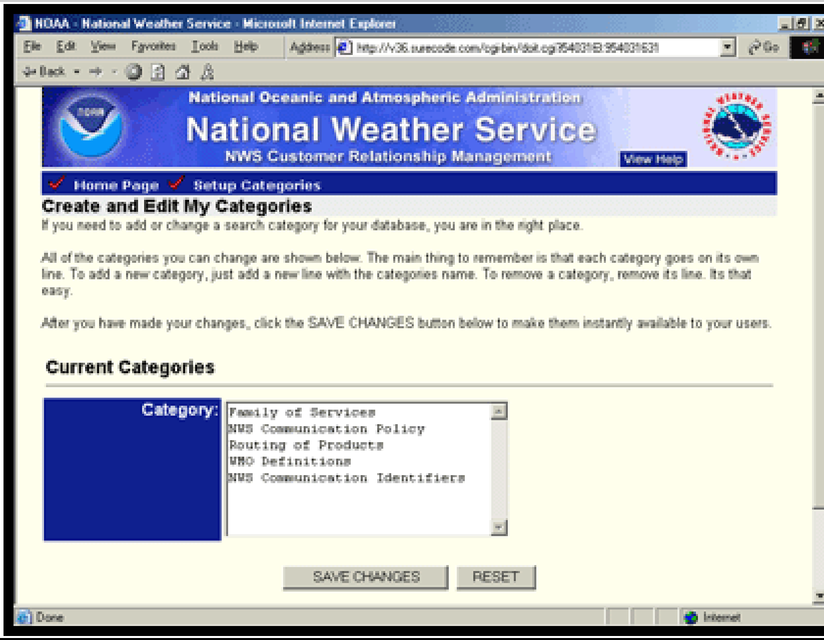
Setup Categories

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor Home page.
Setup Categories:	Click here to return to the Categories Setup page.



DETAILED DESCRIPTION

All of the categories you can change are shown below. The main thing to remember is that each category goes on its own line. To add a new category, just add a new line with the categories name. To remove a category, remove its line.

Do not use any punctuation marks or special characters except for commas and periods. Be careful not to introduce any blank lines either above, below, or in the middle of the list.

In most cases, the categories will be presented in the order in which they are listed here. It is OK to reorder the list so the most frequently used selections appear near the top. In general, the position of an item in the list does not impact any system functions and is only relevant to user presentation.

PAGE LINKS

None.

USER INPUTS

Category:	The list of topics that a knowledge base entry can be assigned to.

OTHER HELP PAGES RELATING TO THIS TOPIC

Categories For Customer Database

Categories For Customer Survey

Categories For Mail List

Categories For Referral Database

Categories For Request Tickets

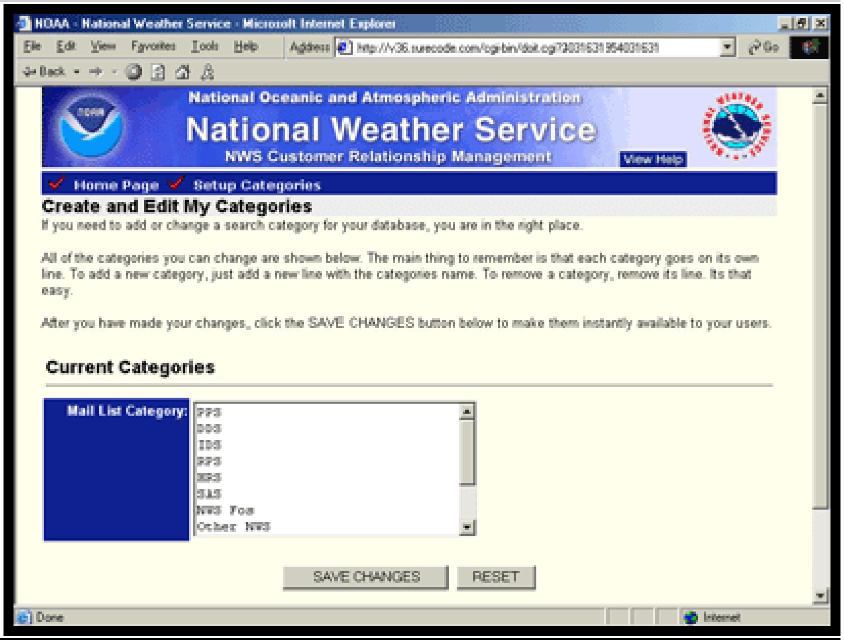
Categories For Service Rep Locations

Setup & Edit Categories

User Manual & Documentation

PAGE TITLE

Categories For Mail List



SYNOPSIS

Use this page to add and edit categories for the Mail List database.

HELP TOPIC

Setup Categories

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor Home page.
Setup Categories:	Click here to return to the Categories Setup page.

DETAILED DESCRIPTION

All of the categories you can change are shown below. The main thing to remember is that each category goes on its own line. To add a new category, just add a new line with the categories name. To remove a category, remove its line.

Do not use any punctuation marks or special characters except for commas and periods. Be careful not to introduce any blank lines either above, below, or in the middle of the list.

In most cases, the categories will be presented in the order in which they are listed here. It is OK to reorder the list so the most frequently used selections appear near the top. In general, the position of an item in the list does not impact any system functions and is only relevant to user presentation.

PAGE LINKS

None.

USER INPUTS

Mail List Category:	Names of available categories.

OTHER HELP PAGES RELATING TO THIS TOPIC

Categories For Customer Database

Categories For Customer Survey

Categories For Knowledge Base

Categories For Referral Database

Categories For Request Tickets

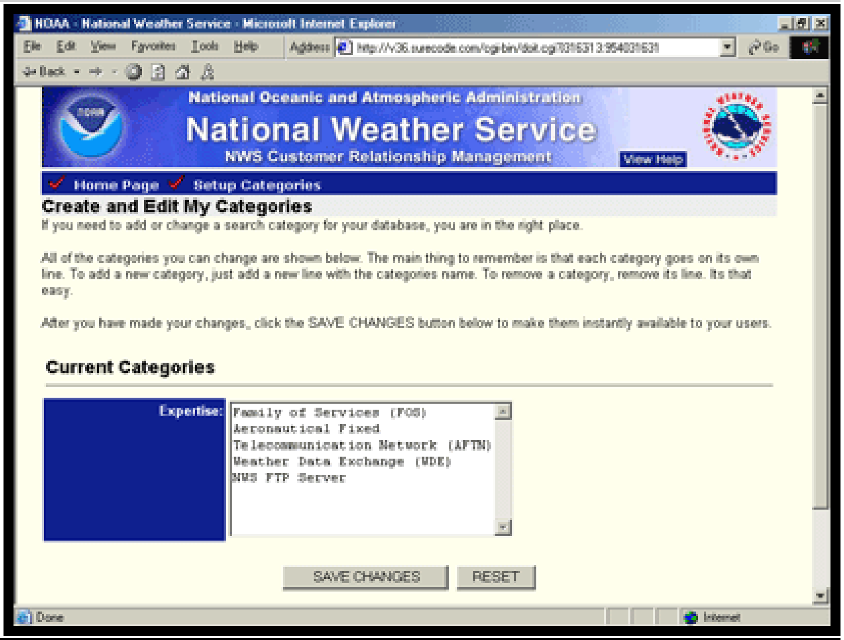
Categories For Service Rep Locations

Setup & Edit Categories

User Manual & Documentation

PAGE TITLE

Categories For Referral Database



SYNOPSIS

Use this page to add and edit categories for the Referral database.

HELP TOPIC

Setup Categories

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor Home page.
Setup Categories:	Click here to return to the Categories Setup page.

DETAILED DESCRIPTION

All of the categories you can change are shown below. The main thing to remember is that each category goes on its own line. To add a new category, just add a new line with the categories name. To remove a category, remove its line.

Do not use any punctuation marks or special characters except for commas and periods. Be careful not to introduce any blank lines either above, below, or in the middle of the list.

In most cases, the categories will be presented in the order in which they are listed here. It is OK to reorder the list so the most frequently used selections appear near the top. In general, the position of an item in the list does not impact any system functions and is only relevant to user presentation.

PAGE LINKS

None.

USER INPUTS

Expertise:	The list of areas of expertise that can to assigned to a given referral contact.

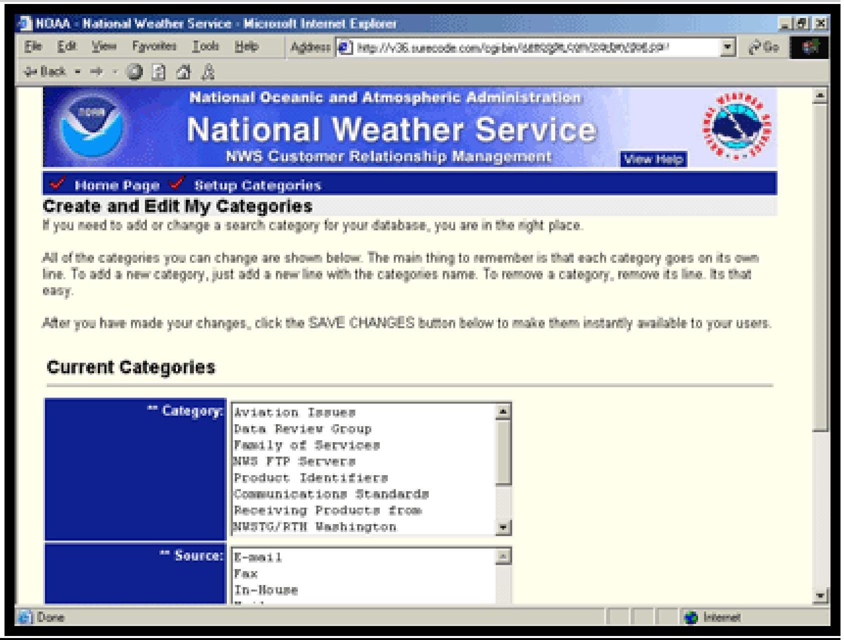
OTHER HELP PAGES RELATING TO THIS TOPIC

- Categories For Customer Database
- Categories For Customer Survey
- Categories For Knowledge Base
- Categories For Mail List
- Categories For Request Tickets
- Categories For Service Rep Locations
- Setup & Edit Categories

User Manual & Documentation

PAGE TITLE

Categories For Request Tickets



SYNOPSIS

Use this page to add and edit categories for the Request Tickets database.

HELP TOPIC

Setup Categories

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor Home page.
Setup Categories:	Click here to return to the Categories Setup page.

DETAILED DESCRIPTION

All of the categories you can change are shown below. The main thing to remember is that each category goes on its own line. To add a new category, just add a new line with the categories name. To remove a category, remove its line.

Do not use any punctuation marks or special characters except for commas and periods. Be careful not to introduce any blank lines either above, below, or in the middle of the list.

In most cases, the categories will be presented in the order in which they are listed here. It is OK to reorder the list so the most frequently used selections appear near the top. In general, the position of an item in the list does not impact any system functions and is only relevant to user presentation.

PAGE LINKS

None.

USER INPUTS

Category:	The list of topics that a request ticket is assigned to. This list is visible to customers from the Request Service page and also is available on the Service Representative Profile page. This field provides the mechanism for routing specific requests to specific Service Representatives.
Source:	The list of sources for a request ticket. This is only accessible to Service Representatives working via the Create a Ticket page. Irrespective of any choices on this list, tickets submitted by customers via the Request Service page are always set to Web as its source.

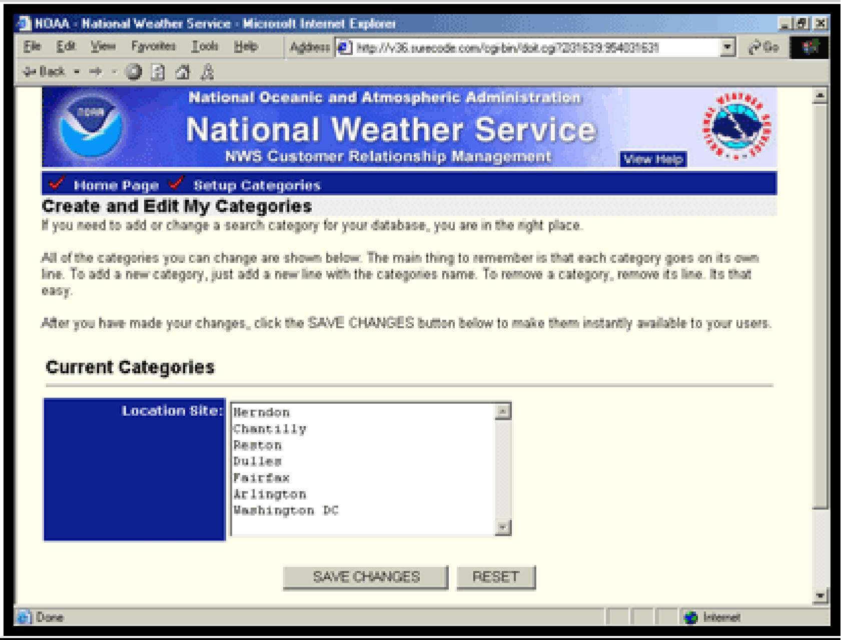
OTHER HELP PAGES RELATING TO THIS TOPIC
Categories For Customer Database
Categories For Customer Survey
Categories For Knowledge Base
Categories For Mail List
Categories For Referral Database
Categories For Service Rep Locations
Setup & Edit Categories

110

User Manual & Documentation

PAGE TITLE

Categories For Service Rep Locations



SYNOPSIS

Use this page to add and edit categories of Service Representative locations.

HELP TOPIC

Setup Categories

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor Home page.
Setup Categories:	Click here to return to the Categories Setup page.

DETAILED DESCRIPTION

All of the categories you can change are shown below. The main thing to remember is that each category goes on its own line. To add a new category, just add a new line with the categories name. To remove a category, remove its line.

Do not use any punctuation marks or special characters except for commas and periods. Be careful not to introduce any blank lines either above, below, or in the middle of the list.

In most cases, the categories will be presented in the order in which they are listed here. It is OK to reorder the list so the most frequently used selections appear near the top. In general, the position of an item in the list does not impact any system functions and is only relevant to user presentation.

PAGE LINKS

None.

USER INPUTS

Location Site:	Names of available service representative locations.

OTHER HELP PAGES RELATING TO THIS TOPIC

- Categories For Customer Database
- Categories For Customer Survey
- Categories For Knowledge Base
- Categories For Mail List
- Categories For Referral Database
- Categories For Request Tickets
- Setup & Edit Categories

User Manual & Documentation

PAGE TITLE

Setup & Edit Categories

SYNOPSIS

Use this page to add and edit categories throughout the system.

HELP TOPIC

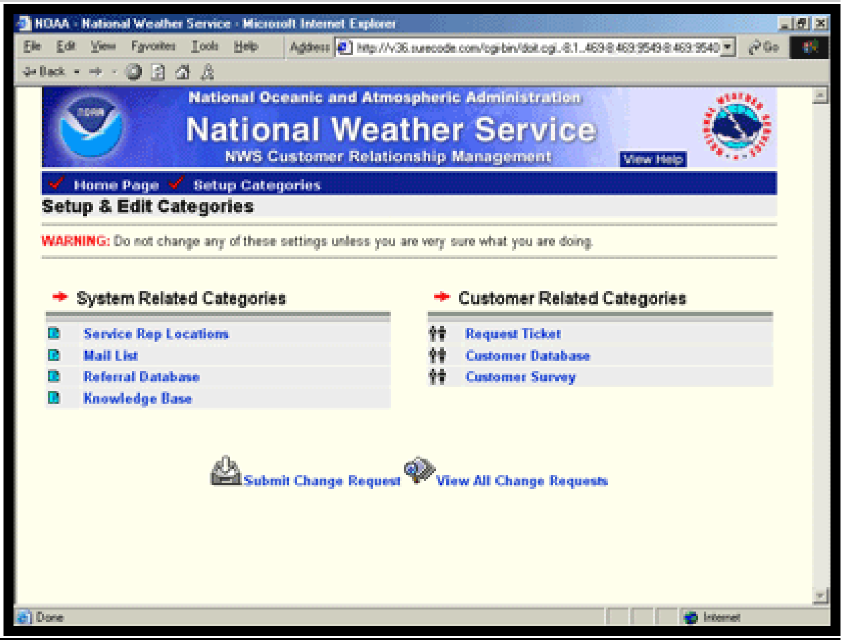
Setup Categories

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Click here to return to the Supervisor Home page.
Setup Categories:	Click here to return to the Setup Categories page (the current page). This option is provided to establish menu consistency for the various pages in this module.



DETAILED DESCRIPTION

WARNING: Categories are used extensively throughout the NWS CRM system to organize and route information and tickets. Although the system gives Supervisors the ability to update many of these directly via the links on this page - modifications should be done with great care. Deleting or changing key categories may cause the system to malfunction.

To be safe, we recommend sending an email to support@surecode.com to confirm a change prior making it here.

Here are some important things to note when working with categories:

(1) Generally speaking, it is much safer to add a new category then it is to delete or rename one.

(2) Changing a category impacts data on a *moving forward* basis and has no impact on any data already stored.

(3) Renaming a category is the same thing as deleting the old and creating a new one.

(4) When defining categories, do not include any special characters or punctuation marks except for commas and periods.

PAGE LINKS

System Related Categories

Service Rep Locations:	Service Representative locations available from the My Profile page.
Mail List:	Categories available from the Mail List database.
Referral Database:	The list of expertise categories.
Knowledge Base:	Categories defined for the internal Knowledge Base database.

Customer Related Categories

USER INPUTS

None

Request Ticket:	Provides access to two key Request Ticket category lists: Source and Category.
Customer Database:	Provides access to four lists that pertain to the Customer database. These are: State, Type, Service Subscriptions, and OPR.
Customer Survey:	Provides access to the list of available responses for the customer survey.

OTHER HELP PAGES RELATING TO THIS TOPIC

Categories For Customer Database

Categories For Customer Survey

Categories For Knowledge Base

Categories For Mail List

Categories For Referral Database

Categories For Request Tickets

Categories For Service Rep Locations

User Manual & Documentation

PAGE TITLE

Customer Survey Feedback

SYNOPSIS

This report provides the department Supervisor with access to customer feedback.

HELP TOPIC

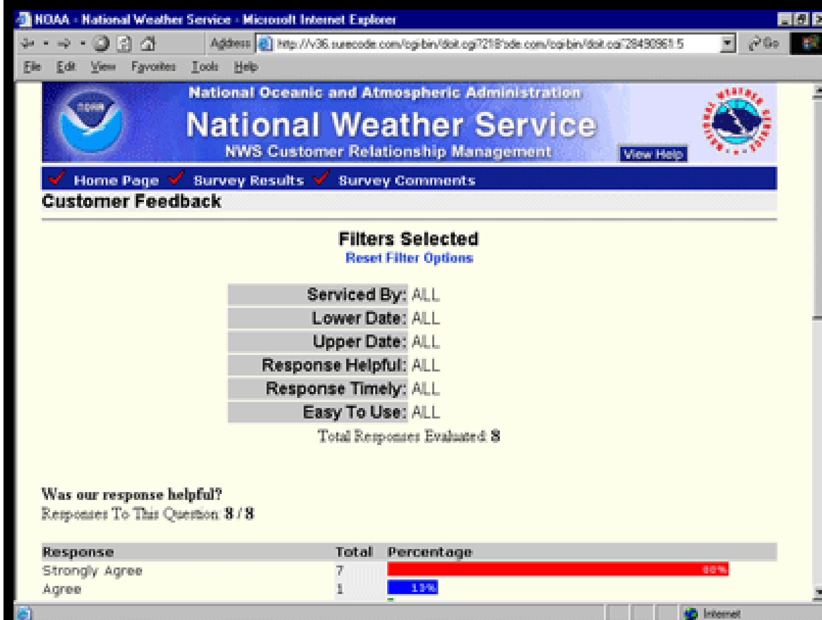
User Feedback

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Survey Results:	Reloads the current page. This link is provided for menu consistency.
Survey Comments:	Click here to view any narrative comments submitted by customers. This data is provided on a separate report because it does not lend itself to graphical presentation.



DETAILED DESCRIPTION

The customer feedback presented in this report is provided in a graphical format.

PAGE LINKS

Reset Filter Options:	Click here to reset the search filter.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Survey Feedback Comments

Filter Customer Survey Results

Survey Completed

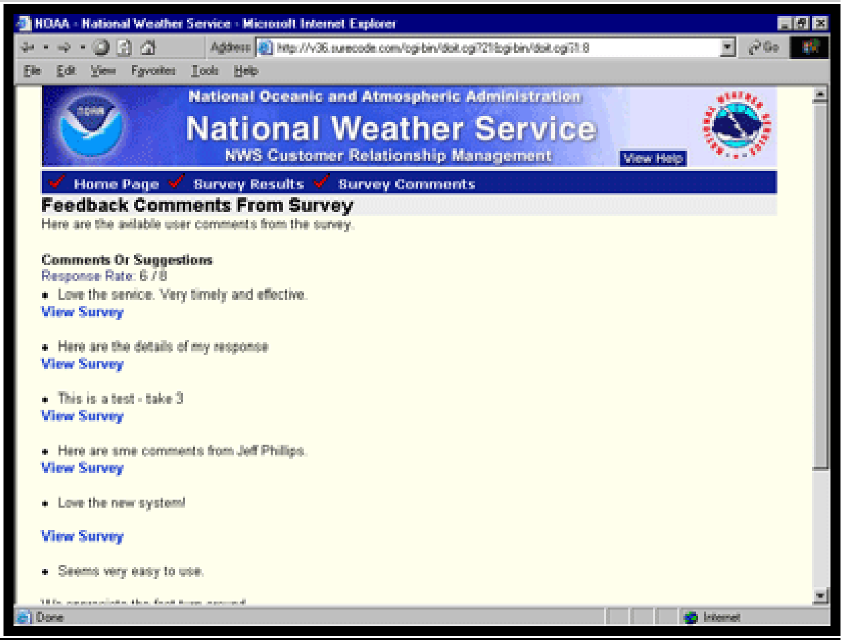
User Feedback Add Page

User Feedback Detail Page

User Manual & Documentation

PAGE TITLE

Customer Survey Feedback Comments



SYNOPSIS

Provides the department Supervisor with access to narrative customer feedback.

HELP TOPIC

User Feedback

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Survey Results:	Links to customer feedback presented in a graphical format.
Survey Comments:	Reloads the current page. This link is provided for menu consistency.

DETAILED DESCRIPTION

This report lists all of the comments submitted by customers when completing their survey. A link from each comment back to the completed survey is provided as well.

PAGE LINKS

View Survey:	Click here to view the entire survey for the customer who provided the listed comments. Recall that the survey page provides links to the complete customer history.

USER INPUTS

None.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Survey Feedback

Filter Customer Survey Results

Survey Completed

User Feedback Add Page

User Feedback Detail Page

User Manual & Documentation

PAGE TITLE

Filter Customer Survey Results

SYNOPSIS

Provides the department Supervisor with the ability to search customer feedback in a variety of ways.

HELP TOPIC

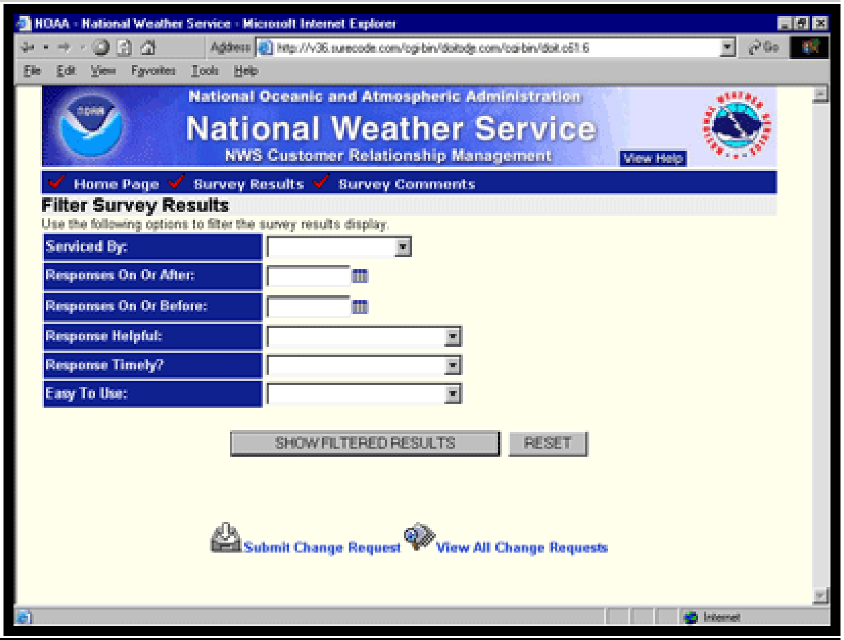
User Feedback

USER CLASS

Supervisor

MENU SELECTIONS

Home Page:	Links to the Supervisor Home page.
Survey Results:	Reloads page you are already on, here for menu consistency.
Survey Comments:	Comments submitted by Users.



DETAILED DESCRIPTION

This page gives you great flexibility when working with feedback provided via the customer survey. You can limit responses based on any combination of fields described in the USER INPUTS section.

Note that the more criteria you provide, the more focused your resulting reports will be. To include all of the surveys provide, just leave all the input fields blank and click the **SHOW FILTERED RESULTS** button.

PAGE LINKS

None

USER INPUTS

The following provides details regarding the available input fields. After you choose your filtering parameters, click the SHOW FILTERED RESULTS button to show your filtered survey results.

Serviced By:	Filter by who serviced the Ticket.
Responses On Or After:	Filter by surveys provided on or after the indicated date.
Responses On Or Before:	Filter by surveys provided on or before the indicated date.
Response Helpful:	Fitler by responses to Response Helpful.
Response Timely:	Fitler by responses to Response Timely.
Easy To Use:	Fitler by responses to Easy To Use.

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Survey Feedback

Customer Survey Feedback Comments

Survey Completed

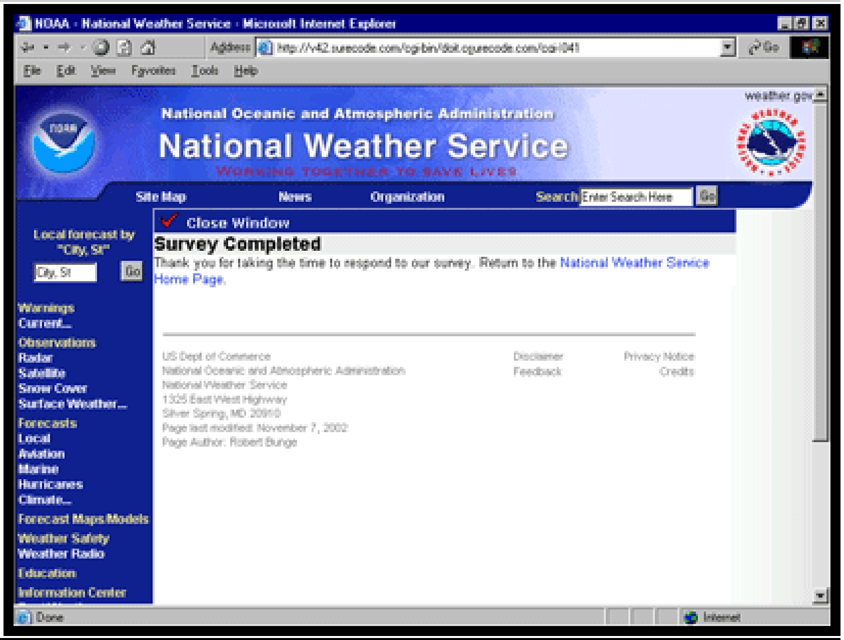
User Feedback Add Page

User Feedback Detail Page

User Manual & Documentation

PAGE TITLE

Survey Completed



SYNOPSIS

Thanks users for completing the survey.

HELP TOPIC

User Feedback

USER CLASS

General Public

MENU SELECTIONS

Close Window:	Closes browser window.

DETAILED DESCRIPTION

Serves as a confirmation for receipt of the survey and comments.

PAGE LINKS

National Weather Service Home Page:	Click here to go to National Weather Service Home Page.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Survey Feedback

Customer Survey Feedback Comments

Filter Customer Survey Results

User Feedback Add Page

User Feedback Detail Page

User Manual & Documentation

PAGE TITLE

User Feedback Add Page

SYNOPSIS

Users submit their surveys from this page.

HELP TOPIC

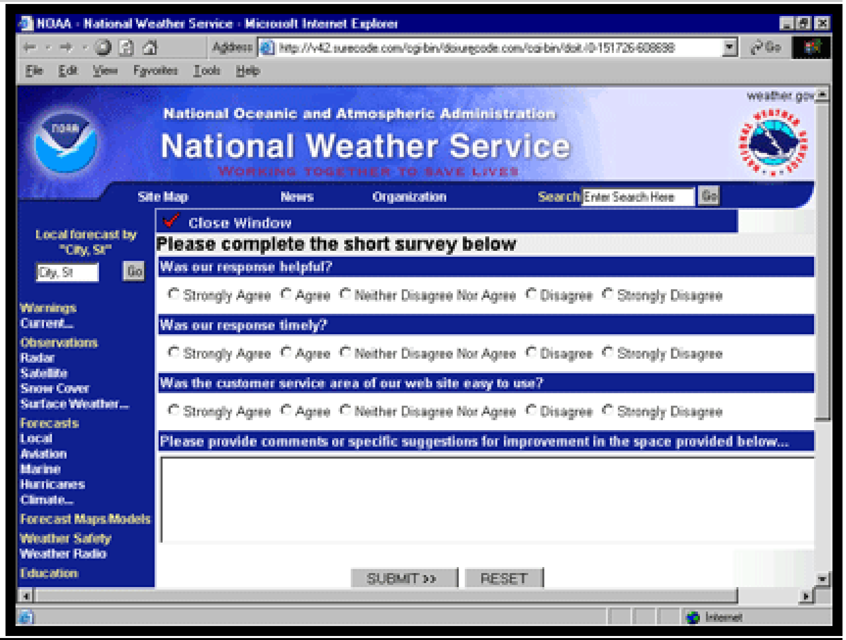
User Feedback

USER CLASS

General Public

MENU SELECTIONS

Close Window:	Closes browser window.



DETAILED DESCRIPTION

Users arrive here via a link sent to them in a confirmation email. They can answer the three questions and submit some comments.

PAGE LINKS

None

USER INPUTS

The following provides detail regarding the available input fields. After you make any necessary edits, click the SUBMIT button to save your changes.

Was our response helpful?:	User chooses selection.
Was our response timely?:	User chooses selection.
Was the customer service area of our web site easy to use?:	User chooses selection.
Please provide comments or specific suggestions for improvement in the space provided below...:	Used to provide comments.

OTHER HELP PAGES RELATING TO THIS TOPIC

[Customer Survey Feedback](#)

[Customer Survey Feedback Comments](#)

[Filter Customer Survey Results](#)

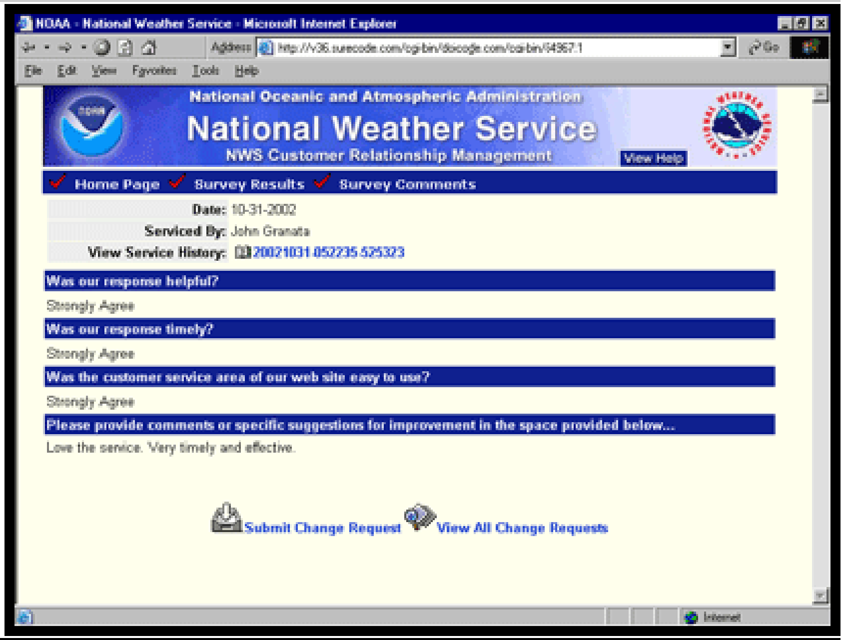
[Survey Completed](#)

[User Feedback Detail Page](#)

User Manual & Documentation

PAGE TITLE

User Feedback Detail Page



SYNOPSIS

Shows user response to feedback questions and comments if submitted.

HELP TOPIC

User Feedback

USER CLASS

Service Representative
Supervisor

MENU SELECTIONS

Home Page:	Links back to the Supervisor or Service Rep Home page.
Survey Results:	Reloads page you are already on, here for menu consistency.
Survey Comments:	Comments submitted by Users.

DETAILED DESCRIPTION

Shows user reponse to the three questions pertaining to helpfulness, timeliness and ease of use. Also shows comments if submitted.

PAGE LINKS

View Service History:	Click here to view the request of the person who submitted this feedback.

USER INPUTS

None

OTHER HELP PAGES RELATING TO THIS TOPIC

Customer Survey Feedback

Customer Survey Feedback Comments

Filter Customer Survey Results

Survey Completed

User Feedback Add Page